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PATENT ABSTRACTS OF JAPAN

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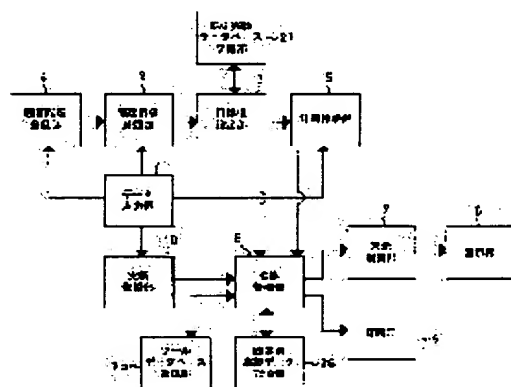
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(54) BUSINESS PROFIT IMPROVEMENT SUPPORT SYSTEM

(57)Abstract:

PURPOSE: To innovatively improve business profit by performing the optimum standardization of business activities.

CONSTITUTION: This system is provided with a customer evaluation and classification part 2 which evaluates various customers under two kinds of evaluation standards that are objective evaluation standards set in consideration of a customer's standpoints and transaction evaluation standards set in consideration of a self-standpoint and classifies the customers according to whether evaluation results are high or low and a target value setting part 3 which sets target values of frequencies of visiting by the customers; and the customers are evaluated more accurately by performing customer evaluation in consideration of the customer's standpoints and classifying the customers according to the evaluation results to make object customers of transaction expansion distinctive, and a waste of business activities is eliminated to properly distribute business visiting power to various customers.



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CLAIMS

[Claim(s)]

[Claim 1] The improvement support system in operating productivity for managing the progress, while drawing up the plan of operating activities characterized by providing the following. The data input means for directing various operations, while inputting various data in formulation of the plan of the above-mentioned operating activities, and management of progress. A customer evaluation / classification means to evaluate various customers and to classify the above-mentioned various customers into the bottom of two error criteria with the dealings error criterion which took into consideration the object error criterion in consideration of a customer's position, and the self position using the data inputted from the above-mentioned data input means according to the height of the evaluation result. A desired value setting means to set up the desired value of the number of times of a visit according to customer according to the result of the evaluation and the classification by the above-mentioned customer evaluation / classification means.

[Claim 2] The planned creation means for drawing up the visit plan to the above-mentioned various customers, and the actual result registration means for registering the actual visit result based on the visit plan drawn up by the above-mentioned planned creation means, Progress of operating activities is managed using the visit result registered by the visit plan and the above-mentioned actual result registration means which were created by the number-of-times desired value classified by customer of a visit and the above-mentioned planned creation means which were set up by the above-mentioned desired value setting means. The improvement support system in operating productivity according to claim 1 characterized by providing further a status-control means by which the degree of the progress to the above-mentioned number-of-times desired value classified by customer of a visit emits warning to a low case.

[Claim 3] The improvement support system in operating productivity according to claim 2 characterized by providing the following. The above-mentioned planned creation means is a doing-business item registration means for registering two or more doing-business items by defining a required tool in operation for every action of a series performed by operating activities. The business talk process registration means for registering at least one or more business talk process patterns by setting up those turn, while choosing some from two or more doing-business items registered with the above-mentioned doing-business item registration means. A business talk planned creation means to draw up a business talk plan by setting up the operation scheduled day of the doing-business item included in the selected business talk process pattern while choosing any they are from the business talk process patterns registered with the above-mentioned business talk process registration means.

[Claim 4] The above-mentioned business talk planned creation means is an improvement support system in operating productivity according to claim 3 characterized by providing a means to perform automatically the function in which correlation is defined as the doing-business item included in the selected business talk process pattern.

[Claim 5] An organization hierarchy registration means to register the above-mentioned various customers according to the hierarchy is provided further. Evaluation and a classification of the customer by the above-mentioned customer evaluation / classification means, a setup of the number-of-times desired value classified by customer of a visit by the above-mentioned desired value setting means, Formulation of the visit plan by the above-mentioned planned creation means, registration of the visit result by the above-mentioned actual result registration means, And the improvement support system in operating productivity given in any 1 term of the claims 2-4 characterized by performing the status control by the above-mentioned status-control means for every organization hierarchy registered by the above-mentioned organization hierarchy registration means.

[Claim 6] The improvement support system in operating productivity given in any 1 term of claims 2-5 characterized by providing the following. The visit plan drawn up by the number-of-times desired value classified by customer of a visit and the above-mentioned planned creation means which were set up with the above-mentioned desired value setting means, the visit result registered by the above-mentioned actual result registration means, and a display means to display the customer name for every organization hierarchy registered with the above-mentioned organization hierarchy registration means in one screen. A display-control means to control to distinguish and express the visit scheduled day and a visit enforcing date as a different color in the above-mentioned rectangular head, and to distinguish and display the customer name for every above-mentioned organization hierarchy by different color corresponding to the classification result by the above-mentioned customer evaluation / classification means while expressing the above-mentioned number-of-times desired value classified by customer of a visit as a square number.

[Claim 7] The above-mentioned display-control means is the improvement support system in operating productivity

according to claim 6 with which the specified date is characterized by to make it display that it moves into the above-mentioned rectangular head in a screen top when a desired date is specified in the above-mentioned calendar, while displaying on the above-mentioned display means the calendar used in order to input the above-mentioned visit scheduled day and the above-mentioned visit enforcing date.

[Translation done.]

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DETAILED DESCRIPTION

[Detailed Description of the Invention]

[0001]

[Industrial Application] Especially this invention is used in order to support performing efficiently the operating activities which a business manager performs about the improvement support system in operating productivity, and it is suitable.

[0002]

[Description of the Prior Art] Generally, since operating activities were that human being carries out to human being, standardization or systematization was difficult for them. For this reason, while computerization progressed in fields, such as sales management, and manufacture management or organization management, many business managers were performing operating activities, depending on experience and intuition.

[0003] While a commercial scene goes into a low-growth time and competition intensifies increasingly on the other hand, corporate management is improved and enabling it to raise many profits for management property, such as the fewest possible time, a man, and a facility, is noted increasingly. Thus, in order to raise the productivity of business, it is necessary to perform operating activities by the suitable method.

[0004]

[Problem(s) to be Solved by the Invention] However, since the method of operating activities had become dependent on the business manager in almost all companies, a business manager's belief, a result, etc. had produced unevenness and futility in operating activities. As for the business manager who improved the actual result and has been said to be excellent in it, it was actual to have devised personally and to have found out the optimal operating method by one's force.

[0005] However, as for a business manager excellent in a company, only a mere handful exists. Therefore, in order to essentially raise operating productivity innovatively as a company, it is necessary to improve the so-called content of activity of standard business managers other than an excellent business manager.

[0006] this invention is accomplished in view of such the actual condition, attains the optimal standardization of operating activities, and aims at enabling it to raise operating productivity innovatively.

[0007]

[Means for Solving the Problem] While the improvement support system in operating productivity of this invention draws up the plan of operating activities The data input means for directing various operations, while being an improvement support system in operating productivity for managing the progress and inputting various data in formulation of the plan of the above-mentioned operating activities, and management of progress, Various customers are evaluated using the data inputted from the above-mentioned data input means under two error criteria with the dealings error criterion in consideration of the object error criterion in consideration of a customer's position, and the self position. It is characterized by providing a customer evaluation / classification means to classify the above-mentioned various customers according to the height of the evaluation result, and a desired value setting means to set up the desired value of the number of times of a visit according to customer according to the result of the evaluation and the classification by the above-mentioned customer evaluation / classification means.

[0008] The planned creation means for the place by which it is characterized [of this invention / other] drawing up the visit plan to the above-mentioned various customers, The actual result registration means for registering the actual visit result based on the visit plan drawn up by the above-mentioned planned creation means, Progress of operating activities is managed using the visit result registered by the visit plan and the above-mentioned actual result registration means which were created by the number-of-times desired value classified by customer of a visit and the above-mentioned planned creation means which were set up by the above-mentioned desired value setting means. The degree of the progress to the above-mentioned number-of-times desired value classified by customer of a visit is characterized by providing further the status-control means which emits warning to a low case.

[0009] The place by which it is characterized [of others of this invention] the above-mentioned planned creation means The doing-business item registration means for registering two or more doing-business items by defining a required to be in operation for every action of a series performed by operating activities, By setting up those turn, while choosing some from two or more doing-business items registered with the above-mentioned doing-business item registration means While choosing any they are from the business talk process patterns registered with the business talk process registration means for registering at least one or more business talk process patterns, and the above-mentioned business talk process registration means It is characterized by having a business talk planned

creation means to draw up a business talk plan by setting up the operation scheduled day of the doing-business item included in the selected business talk process pattern.

[0010] The place by which it is characterized [of others of this invention] is characterized by the above-mentioned business talk planned creation means possessing a means to perform automatically the function in which correlation is defined as the doing-business item included in the selected business talk process pattern.

[0011] The place by which it is characterized [of others of this invention] possesses further an organization hierarchy registration means to register the above-mentioned various customers according to the hierarchy. Evaluation and a classification of the customer by the above-mentioned customer evaluation / classification means, a setup of the number-of-times desired value classified by customer of a visit by the above-mentioned desired value setting means, It is characterized by performing formulation of the visit plan by the above-mentioned planned creation means, registration of the visit result by the above-mentioned actual result registration means, and the status control by the above-mentioned status-control means for every organization hierarchy registered by the above-mentioned organization hierarchy registration means.

[0012] The number-of-times desired value classified by customer of a visit to which the place by which it is characterized [of others of this invention] was set with the above-mentioned desired value setting means, The visit plan drawn up by the above-mentioned planned creation means, the visit result registered by the above-mentioned actual result registration means, and a display means to display the customer name for every organization hierarchy registered with the above-mentioned organization hierarchy registration means in one screen, While expressing the above-mentioned number-of-times desired value classified by customer of a visit as a square number, the visit scheduled day and a visit enforcing date are distinguished and expressed as a different color in the above-mentioned rectangular head. It is characterized by providing a display-control means to control to distinguish and display the customer name for every above-mentioned organization hierarchy by different color corresponding to the classification result by the above-mentioned customer evaluation / classification means.

[0013] The place by which it is characterized [of others of this invention] carries out that the specified date makes it display that it moves into the above-mentioned rectangular head in a screen top as the feature in the above-mentioned display-control means, when a desired date is specified on the above-mentioned calendar, while displaying on the above-mentioned display means the calendar used in order to input the above-mentioned visit scheduled day and the above-mentioned visit enforcing date.

[0014]

[Function] As opposed to having performed conventionally only dealings evaluation which took the self position into consideration chiefly, since this invention consisted of the above-mentioned technical means While object evaluation in consideration of a customer's position will also be performed, and a customer will be classified based on the evaluation result, evaluating a customer to accuracy more and becoming possible to clarify the customer who should do dealings expansion It becomes possible to distribute the operating visit force exactly so that the number of times of a visit to the above-mentioned customer who should do dealings expansion may increase.

[0015] Since according to other features of this invention warning comes to be emitted when the visit is not carried out appropriately in spite of having set up the desired value of the number of times of a visit, the customer who should visit by the present top priority can be easily checked by seeing the existence of the warning.

[0016] Since what is necessary is just to choose a suitable thing out of the above-mentioned various business talk process patterns in case according to the feature of others of this invention various business talk process patterns are beforehand created among a series of actions performed by operating activities combining two or more arbitrary actions and an individual business talk is actually carried out, it becomes possible to draw up an individual business talk implementation plan simply.

[0017] According to the feature of others of this invention, in various doing-business items, respectively for example, when it is possible to define beforehand functions, such as a tool output and an operation result mark input, and the function is defined Since the function related with the doing-business item included in the business talk process pattern chosen on the occasion of formulation of an individual business talk implementation plan is performed automatically, even if a business manager is not conscious of especially a tool required at the time of business talk implementation, the tool comes to be obtained certainly.

[0018] every organization hierarchies of all on a customer and in connection with [according to the feature of others of this invention] purchase decision making — management — ***** — it becomes possible to become things and to distribute the limited operating visit force more exactly

[0019] According to the feature of others of this invention, the number of times of a visit is made [many], the customer who should do dealings expansion, the situation of progress of operating activities, etc. glance, and it comes to understand, and in order to raise operating productivity, a suitable visit plan can be drawn up easily.

[0020] According to the feature of others of this invention, since the date moves according to the animation effect in the screen top, the operation at the time of being able to draw up a visit plan now with game feeling, and drawing up a visit plan also becomes intelligible.

[0021]

[Example] As a result of an applicant's investigating over a long period of time, in order to raise operating productivity in the limited operating force, it became clear that it is necessary to realize the following three things continuously.

** Clarify the customer (customer in whom dealings expansion is possible) who wants to carry out dealings expansion, and make the customer concentrate the operating force.

** Collect the information in connection with not only way promotion but the business chance found alongs expansion from a customer, and aim at an order received by the proposal which utilized it.

** Build a margin so that a business manager can concentrate on operating activities.

[0022] In order to realize three concepts of the above-mentioned ** - **, it becomes important to carry out the following three points.

- Distribute the operating visit force to the customer who wants to carry out dealings expansion proper.
- Carry out planned visit activities to all the men in connection with a customer's purchase decision making.
- It has a scenario for dealings expansion and carry this out intentionally.

The improvement support system in operating productivity of this example has the following four functions which support carrying out the above three points, as shown in drawing 16.

[0023] (1) A number-of-times of operating visit proper distribution functional book function is a function for distributing to the customer who wants to carry out dealings expansion of the limited operating visit force proper. That is, in this function, while setting up a target, in order to realize the set-up target, a visit plan is drawn up periodically, and it supports visiting as planned.

[0024] (2) The number of the points which should perform the function manager operating visit for [classified by organization hierarchy] a visit is not one about one customer. That is, not only a customer's person in charge but its manager of having a contact periodically with all the men in connection with a partner's purchase decision making etc. is very effective. This function registers altogether the customer who distributes the operating force according to the hierarchy, manages actions, such as the number of times of a visit, according to each hierarchy, and offers thing support.

[0025] (3) The action which should be performed there, and its schedule, i.e., a certain power process, exist in a business talk at a general business talk implementation support function. Referring to the process of a certain patternized power business talk, this function draws up the plan of an individual business talk simply, and supports the activity based on the plan.

[0026] (4) Describe above a planned operating-activities support functional book function. (1) - (3) While a business manager and a manager are always conscious of each function, it is the function which supports carrying out intentionally. That is, this function is described above. (1) - (3) It is a function for combining each function and performing intelligibly an input, analysis, etc. of formulation of a visit plan, and the execution result of the plan easily.

[0027] Hereafter, one example of this invention is explained based on a drawing. Drawing 1 is described above. (1) - (4) It is the functional block diagram showing the element-feature of the improvement support system in operating productivity by this example for realizing each function. Moreover, drawing 2 is drawing showing the hardware composition for carrying out concretely each functional block shown in drawing 1.

[0028] As shown in drawing 2, the improvement support system in operating productivity of this example is realized by the personal computer system which has generally spread. That is, as for a keyboard and 23, in this drawing, the main part of a personal computer with which 21 built in CPU, ROM, RAM, etc., and 22 are [a mouse and 24] display units.

[0029] 25 is the tool database storage section and the various tools used for operating activities are memorized. As the above-mentioned various tools, the interest attachment tool to a customer, a reaction inquiry tool, the interest attachment status-control sheet classified by customer, a business chance information gathering tool, a key man evaluation tool, etc. can be mentioned, for example.

[0030] 26 is the status-control data-storage section classified by customer, and the progress data based on the content of a plan of the operating activities inputted by the visit plan inputted by the business manager, a visit result, or the manager etc. are memorized. 27 is the dealings actual result data-storage section, and the data about a dealings actual result with a customer are memorized.

[0031] In addition, these tool database storage sections 25, the status-control data-storage section 26 classified by customer, and the dealings actual result data-storage storage section 27 consist of a hard disk, a floppy disk, etc.

[0032] 28 is the required tool creation section, actually creates the tool chosen from the various tools memorized by the above-mentioned tool database storage section 25, and consists of printers for printing the documents addressed to a customer for example, etc.

[0033] A business manager draws up a operating plan using the personal computer system of such composition, carries out the plan, and carries out operating activities by evaluating an execution result. Thereby, to the former depending on experience of a business manager or intuition, by this example, standardization of operating activities can be attained and operating productivity can be raised now.

[0034] Next, in drawing 1, 1 is the data input section and is constituted by the keyboard 22 and mouse 23 which were shown in drawing 2. 2 is customer evaluation / classification section, and evaluates and classifies various customers under a fixed error criterion. Hereafter, the method of this customer evaluation is explained based on drawing 3 shown below.

[0035] this example is estimating the customer from two sides of object evaluation and dealings evaluation so that clearly from drawing 3. As valuation criteria of object evaluation, there are sales, a manager's motivation, possibilities, a site condition, etc., and these items are grasped as a thing in consideration of the position of a partner company (customer), for example. Moreover, as evaluation criteria of dealings evaluation, there are dealings, a rate of a gross income, a pulse duty factor, recovery conditions, etc., and these items are grasped as a thing in consideration of the position of a self-company, for example.

[0036] Moreover, customer evaluation / classification section 2 of this example divides the customer into four classifications based on the evaluation performed as mentioned above. That is, as shown in drawing 3, according to the height of each evaluation, the customer is divided into four classifications, an improvement management visitor, an important management visitor, a semi-important management visitor, and a drifting-management visitor, for the result of the dealings evaluation of the result of object evaluation for a vertical axis for the horizontal axis.

[0037] Here, although the result of dealings evaluation is low, the result of object evaluation is a high customer, and an improvement management visitor will mean a customer's thing which dealings may expand further, if a certain improvement is added to operating activities. Moreover, each of results of object evaluation and results of dealings evaluation is high customers, and an important management visitor means the customer who moreover has possibilities at a good customer.

[0038] Moreover, although the result of dealings evaluation is high, the result of object evaluation is a low customer, and although a semi-important management visitor is a good customer, he means the customer who lacks in possibilities. Furthermore, each of results of object evaluation and results of dealings evaluation is low customers, and a drifting-management visitor means a customer without possibilities.

[0039] Drawing 4 is drawing showing the procedure of the above customer evaluations and a classification. Namely, operators, such as a manager, input the evaluating point of five-point full marks for every item of object evaluation and dealings evaluation using the data input section 1 of drawing 1 with reference to an evaluation table like drawing 4 (a) created beforehand. This obtains a customer evaluation result like drawing 4 (b).

[0040] In addition, on the occasion of this evaluation, an evaluation table which is different whether a customer is a retail store or you are a mass retailer is used. Moreover, if the improvement support system in operating productivity possesses the evaluation table itself and a manager actually inputs a numeric value into each item, you may constitute so that it may be automatically transposed to an evaluating point.

[0041] If the evaluating point of each item is inputted, the sum total of the evaluating point of object evaluation and the sum total of the evaluating point of dealings evaluation will be separately calculated for every customer by customer evaluation / classification section 2, respectively, and each customer will be divided into four classifications when the result is plotted by the system of coordinates shown in drawing 4 (c). The classification result shown in drawing 4 (c) is displayed on the display 8 of drawing 1, and can also be printed by the printing section 9. This display 8 corresponds to the display unit 24 of drawing 2, and the printing section 9 corresponds to the required tool creation section 28.

[0042] In addition, although it is obtained when the boundary of each classification shown by the dotted line in drawing 4 (c) makes all the items three points, this can be changed arbitrarily. Moreover, it is also possible not to add the evaluating point of each item simply, but to make it add, carrying out weighting.

[0043] By the way, although the easy sales management tool was proposed from before, this sales management tool was what performs only dealings evaluation chiefly. On the other hand, in this example, object evaluation is also performed, a customer's position is also taken into consideration and evaluation and the classification are performed. By doing in this way, a customer can be evaluated more to accuracy and the customer who should expand dealings, the customer who should maintain, or the customer who should do dependent on the result can be easily judged now.

[0044] It returns and explains to drawing 1 again. 3 is the desired value setting section and sets up the desired value of the number of times of a month-long visit according to customer. That is, a business manager or a manager defines a concrete dealings budget numeric value with reference to the result of the evaluation and the classification by the above-mentioned customer evaluation / classification section 2, and the dealings actual result of the past memorized by the dealings actual result data-storage section 27, and inputs the desired value of the optimal number of times of the month-long visit classified by customer for realizing this using the data input section 1.

[0045] In addition, in order to make ***** which manages certainly the desired value of the set-up number of times of a visit, the business manager computes the number of cases the total which it can visit to monthly, and enables it to set up the number of times of a visit at this example only in the range which is not [upper **] about it. That is, if the number-of-times desired value of a month-long visit according to customer is inputted as mentioned above, the sum total of the number of times of a month-long visit will be displayed on the number-of-times check column 51 of a visit of the screen shown in drawing 5, and the visit average number of cases per day will be displayed simultaneously. Then, desired value is adjusted so that it may not turn around the number of cases a top the total to which the sum total of the number of times of a month-long visit can visit a business manager.

[0046] Thus, unlike an old sales management tool, in this example, the feature is in the place it is made to set up the number of times of a visit which should be performed to the dealings budget numeric value reflecting the intention of how to want to act as the customer based on a past dealings actual result and a past customer evaluation result, and the well which realizes it.

[0047] Then, it can distribute now to the customer who wants to carry out dealings expansion of the operating visit force properly by setting up desired value so that the number of times of a visit may increase to the customer who clarified and who wants to carry out dealings expansion by above valuation and classifications. In addition, in order to raise operating productivity efficiently, it is desirable to distribute the operating force in order of an improvement management visitor, an important management visitor, a semi-important management visitor, and a drifting-management visitor.

[0048] Through the status-control section 6, the desired value of the number of times of the month-long visit

classified by customer set up by the above-mentioned desired value setting section 3 is given to the status-control data-storage section 26 classified by customer, and is memorized. Moreover, the desired value of the above-mentioned number of times of the month-long visit classified by customer memorized by the status-control data-storage section 26 classified by customer is given to the display-control section 7 through the status-control section 6, and is displayed on a display 8 under control by this display-control section 7.

[0049] Drawing 6 is drawing showing an example of the screen displayed on the above-mentioned display 8, and is drawing showing the month-long visit schedule / actual result input screen for business managers. The desired value of the number of times of a visit set up as mentioned above is reflected and displayed on the schedule / actual result display area 61 in drawing 6. That is, in above-mentioned schedule / actual result display area 61, field 61a enclosed with the thick line expresses the desired value of the number of times of a visit (this field is hereafter called number-of-times viewing area of a visit), and the number of **s in this field 61a corresponds to the desired value of the number of times of a visit.

[0050] Again, in drawing 1, 4 is the customer hierarchy registration section and registers the customer who distributes the operating force according to the hierarchy. As mentioned above, the points which should perform a operating visit are [in / customers, such as not only one person in charge but its superior official, and a man of one's related post, / customer / one] / all the men in connection with purchase decision making.

[0051] Then, the customer hierarchy registration section 4 is formed and it enables it to register its vertical relation with the man in connection with purchase decision making in this example, so that it may illustrate to drawing 7. In addition, a business manager or a manager performs procedure required for registration using the data input section 1.

[0052] If a customer hierarchy is registered like the above-mentioned example of drawing 7, as shown in drawing 8, the customer name registered according to the hierarchy will come to be displayed on the customer name area 81 of a month-long visit schedule / actual result input screen together with the order to which an activity wait is applied based on the customer evaluation result by the above-mentioned customer evaluation / classification section 2. Although these customer names are not clear from drawing 8 at this time, it is expressed as a different color according to the classification result (any of an important management visitor, an improvement management visitor, a semi-important management visitor, and a drifting-management visitor are they?) by the above-mentioned customer evaluation / classification section 2.

[0053] Moreover, creation, its actual result total, etc. of a setup of the desired value which said previously that a customer hierarchy is registered, and the visit plan described later can be performed now according to a customer hierarchy.

[0054] Subsequently, 5 is the planned creation section and draws up a business manager's visit plan (a business talk process is included). If a business manager or a manager inputs various data using the data input section 1 with reference to the above-mentioned month-long visit schedule / actual result input screen displayed on a display 8 based on the desired value set up by the above-mentioned desired value setting section 3, the above-mentioned planned creation section 5 will draw up a visit plan using this inputted data.

[0055] In case a visit plan is drawn up, the work of burying the visit scheduled day is done on each ** in number-of-times viewing-area of visit 61a shown in drawing 6 (since it is what is performed after a schedule input performs an actual result input, the screen of actual result input mode is shown in drawing 6, and the screen of schedule input mode is shown in drawing 8). As operation, first, a schedule / actual result input button 63 is operated, and schedule input mode is chosen. In addition, when schedule input mode is chosen, the date in the date selection area 62 is blue, and it is displayed, and when actual result input mode is chosen, it is displayed in red.

[0056] Next, in the date selection area 62, if a mouse cursor is placed on the date which is planning the visit and mouse button is clicked, the date moves to a schedule / actual result display area 61 automatically according to the animation effect, and is buried in an order from the head by each ** in number-of-times viewing-area of visit 61a. In this way, an input of the date of a visit schedule displays the sum total of the visit number of cases for with [every] a day on the visit number-of-cases area 64. Thereby, as compared with the average visit number of cases per [which a business manager can visit] day, it can check whether it is realizable.

[0057] In addition, the date of a blue display is expressed with the usual number on the convenience of a drawing, and in number-of-times viewing-area of visit 61a, and the date of a red display is expressed with the number with O. The number of a red display shows the visit enforcing date inputted by the procedure mentioned later. Thus, in this example, since a color is changed and it is made to display the date of a visit schedule, and the date of a visit enforcing date, both are distinguishable at a glance.

[0058] Moreover, the portion shown with the slash in the above-mentioned number-of-times viewing-area of visit 61a is a field currently displayed in yellow in fact. This field has few dates which it actually visited to the number-of-times desired value of a month-long visit shown by the number of **s, and it is displayed in order that the degree of progress may give warning to a low case, and the customer who should visit to top priority at present, and its number of times are shown. Therefore, the field of this yellow display increases, so that it goes to the end of the month.

[0059] Thus, in this example, in case a visit plan is drawn up, by seeing the number of **s in number-of-times viewing-area of visit 61a, the number-of-times desired value of a month-long visit can be checked easily, and the consciousness of distributing with the visit scheduled day more mostly to a customer with many **s can be worked. Moreover, to the customer to whom warning of a yellow display is carried out, the consciousness of setting up with the visit scheduled day by top priority can also be worked. For this reason, the formulation of a visit plan and the

check of an actual result which always took into consideration achievement of the number of times desired value of a visit can be performed now.

[0060] As mentioned above, the planned creation section 5 also performs creation of a business talk process. Although there are various actions in operating activities, these actions are continuing and what arranged those actions in purpose-oriented becomes a business talk process. That is, having a business talk turns over in order the bunch of the card which indicated various actions, and it is transposed to carrying out the written content of the card. The planned creation section 5 of this example enables it to make creation and the determination of turn of a card simply on a personal computer. [0061] That is, the composition for creating the business talk process of the planned creation section 5 has become like drawing 9. Hereafter, the procedure which creates a business talk process is explained, referring to the composition of this drawing 9.

[0062] First, in the doing-business item registration section 91 of drawing 9, two or more action cards (doing-business item) are created for every action of a series performed by operating activities by defining a required tool (for example, information with which a customer should be provided and information which should be collected from a customer) in operation. Here, as shown in drawing 10, while carrying out the keyboard entry of the required tool name in a doing-business name or a business talk, a doing-business classification name and a business talk progress classification name are chosen from the drop down list (not shown) set up beforehand.

[0063] Next, in the business talk process registration section 92, some are arbitrarily chosen from two or more action cards created in the above-mentioned doing-business item registration section 91, and a business talk process pattern (business talk classification) is registered by setting up those selected turn and operation periods of an action card. Moreover, on the occasion of the registration, in case a schedule is created, the action used as criteria is defined.

[0064] As shown in drawing 11, while specifically carrying out the keyboard entry of the business talk classification name to the business talk classification area 111, the action card which constitutes a business talk process out of the doing-business item area 112 is chosen arbitrarily, and the selected action card is stuck on the doing-business plan area 113 in order. And an operation period is set up for every doing business by inputting into the cell 114 of each week of doing business numerically how many times the selected action is performed.

[0065] If a business manager hits carrying out an individual business talk, while choosing a suitable thing in the business talk planned creation section 93 out of the business talk process pattern (business talk classification) registered in the above-mentioned business talk process registration section 92, an individual business talk implementation plan is drawn up by setting up the date of a criteria action.

[0066] That is, as shown in drawing 12, while carrying out the keyboard entry of the business talk name to the business talk area 121, the business talk process pattern (business talk classification) registered in the above-mentioned business talk process registration section 92 in the business talk classification area 122 is chosen from a drop down list. Then, doing business, its number of times of operation, and an operation period are automatically displayed on the doing-business plan area 113.

[0067] Next, while choosing a candidate customer from a drop down list in the candidate customer area 123, the doing-business item (act card) already registered in the criteria doing-business item area 124 is chosen from a drop down list. And if a date of record is inputted into the date-of-record area 125 and a setup key 126 is pushed, the doing-business plan area 113 will be automatically set up in accordance with doing business which carried out [above-mentioned] selection with the date of record which carried out [above-mentioned] the input.

[0068] As mentioned above, in this example, since what is necessary is just to choose a suitable thing out of the above-mentioned various business talk process patterns in case various business talk process patterns are beforehand created among a series of actions performed by operating activities combining two or more arbitrary actions and an individual business talk is actually carried out, an individual business talk implementation plan can be drawn up easily.

[0069] In addition, in case the visit plan mentioned above in the planned creation section 5 is drawn up, the drawn-up business talk plan can be referred to by list. Drawing 13 shows an example of the reference screen. In drawing 13, the business talk plan set up based on the screen of drawing 12 is displayed on the upper part of the business talk progress table 131.

[0070] About four weeks which the plan actual result column of this business talk progress table 131 begins, the action card which should be performed to each week action card field 132 just below for every week is shown. Although the action card shown in each of this week action card field 132 carried out the plan, it is a card in which the action which has not been carried out yet is shown. Therefore, if this display is seen, the action which should be done now can be judged exactly.

[0071] Then, in each week act card field 132, a business manager sets up the act which should be done from now on by choosing the date of the right schedule input column 133 while choosing the act card with which the week near present is left behind by mouse click operation. Then, the selected act card is displayed on the bottom of the above-mentioned date.

[0072] Moreover, if a business talk plan is registered in this way, the date which planned the business talk plan will be blue, and will be expressed as the month-long visit schedule / actual result input screen at the time of the schedule input mode shown in drawing 8. Furthermore, the number of cases of the business talk registered now is expressed in the business talk number-of-cases area 82 as this month-long visit schedule / actual result input screen.

[0073] By this looking at this business talk number of cases, the number of **s of the white showing the number-

of-times desired value of a month-long visit, and the sum total of the date of the customer name by which it was indicated by classification by color, and a visit schedule / actual result, and the visit number of cases. It can judge from two viewpoints ["visit / where / in order to perform the visit activities with sufficient balance / it"] "where it should visit in order to manage the business talk currently held now", consequently the customer who should visit while looking at the whole balance can be judged exactly.

[0074] In addition, when the required tool is built for hand registered in the above-mentioned doing-business item registration section 91 in operation of the planned action card, it is automatically printed by the printing section 9. since a customer name etc. can be put into the tool in that case — ON — a RIYU tool can be created

[0075] On the other hand, a business manager registers the visit result as an actual result using the actual result registration section 10, when the planned operating activities are actually performed. The list of the business talks registered also at the time of the input of this visit result can be referred to. That is, in the month-long visit schedule / actual result input screen shown in drawing 6, if actual result input mode is chosen and the mouse click of the date in the date selection area 62 is carried out, the same visit schedule / actual result input screen as drawing 13 as shown in drawing 14 will be displayed.

[0076] In drawing 14, a business talk plan is displayed on the upper part of the business talk progress table 131 like the screen of drawing 13. Moreover, if the action card actually performed out of the action card shown in the right actual result input column 141 is chosen and the blank section under it is clicked, the character of a card will change to blue shell red, and will be registered as an actual result. In this way, the registered actual result is automatically reflected in the lower part of the plan actual result column of the business talk progress table 131, and is displayed on it. And if the screen shown in this drawing 14 is closed, it will return to the screen shown in drawing 6. At this time, the blue schedule display has changed to the red actual result display automatically.

[0077] Moreover, in the improvement support system in operating productivity of this example, it can indicate by list, or the situation of business talk progress can be printed, and it can use for management. Drawing 15 is drawing showing the list display screen of business talk progress. The display of the plan actual result column of the business talk progress table 131 of the screen shown in drawing 14 is expressed as this screen sequentially from the high thing of the degree of business talk progress.

[0078] Since planned implementation of two or more business talks is not only supportable, but data can be passed to the personal digital assistant equipment which is not illustrated through a floppy disk etc. by the business talk implementation support function of this example which was described above, in business talk implementation, a required tool can be created on that spot, or the result after operation can be totaled. For this reason, there is a merit that a required check and required action can be performed easily in a operating site.

[0079] In addition, customer evaluation / classification section 2, the desired value setting section 3, the customer hierarchy registration section 4, the planned creation section 5, the status-control section 6, and the display-control section 7 of drawing 1 explained above are constituted by CPU, ROM, RAM, etc. which are built in the main part 1 of a personal computer shown in drawing 2 and which are not illustrated.

[0080]

[Effect of the Invention] Since not only the dealings evaluation in consideration of the self position but object evaluation in consideration of a customer's position is performed and the customer was classified based on the evaluation result as this invention was mentioned above, the customer who should evaluate a customer to accuracy more and should do dealings expansion can be clarified, the futility in operating activities can be excluded, and the operating visit force can be distributed proper to various customers.

[0081] The number-of-times desired value classified by customer of a visit which was set up by the desired value setting means according to other features of this invention, Since progress of operating activities is managed using the visit plan drawn up by the planned creation means and the visit result registered by the actual result registration means and the degree of the progress to the above-mentioned number-of-times desired value classified by customer of a visit emitted warning to the low case. By seeing the existence of warning, the customer who should visit by the present top priority can be checked easily, and it can support so that the set-up number-of-times desired value of a visit can be attained certainly.

[0082] The inside of a series of actions which are performed by operating activities according to the feature of others of this invention, In case various business talk process patterns are beforehand created combining two or more arbitrary actions and an individual business talk is actually carried out. Since the business talk plan was drawn up by choosing a suitable thing out of the above-mentioned various business talk process patterns. A business talk plan can be drawn up easily, the work which must be prepared before the visit to a customer is lessened, and a business manager can make it possible to concentrate on a business talk.

[0083] Since it was made to perform the function in which correlation is defined as the doing-business item chosen on the occasion of formulation of an individual business talk implementation plan automatically according to the feature of others of this invention. For example, when the output function of a tool is defined as the above-mentioned function, even if a business manager is not conscious of especially a tool required at the time of business talk implementation, the tool can be certainly obtained now and the work which must prepare before the visit to a customer can be lessened further.

[0084] Since according to the feature of others of this invention an organization hierarchy registration means to register various customers according to the hierarchy is established and it was made to perform a status control for every organization hierarchy, in a customer, detailed management can be performed now to all the main in connection with purchase decision making, and the limited operating visit force can be distributed still more exactly.

[0085] While expressing the number-of-times desired value classified by customer for a visit as a square number according to the features of this invention Since the visit scheduled day and the visit enforcing date were distinguished and expressed as a different color in the above-mentioned rectangular head, and the customer name for every organization hierarchy is distinguished by different color according to the classification result by customer valuation / classification means and was displayed He can glance at the customer who should concentrate the operating visit force, and the situation of progress of operating activities, and can understand now, creation, an actual result input, etc. of a visit plan can be worked easily intelligibly, and the work of those other than the most important business talk among operating activities can be suppressed now to necessary minimum.

[0086] While displaying on the above-mentioned display means the calendar used in order to input the above-mentioned visit scheduled day and the above-mentioned visit enforcing date according to the feature of others of this invention Since it was made to make it display that the specified date moves into the above-mentioned rectangular head in a screen top when a desired date was specified on the above-mentioned calendar, while being able to draw up a visit plan with game feeling, operation for the creation can be made intelligible.

[0087] By the above thing, according to this invention, the optimal standardization of operating activities can be attained and operating productivity can be raised innovatively.

[Translation done.]

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TECHNICAL FIELD

[Industrial Application] Especially this invention is used in order to support performing efficiently the operating activities which a business manager performs about the improvement support system in operating productivity, and it is suitable.

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PRIOR ART

[Description of the Prior Art] Generally, since operating activities were that human being carries out to human being, standardization or systematization was difficult for them. For this reason, while computerization progressed in fields, such as sales management, and manufacture management or organization management, many business managers were performing operating activities, depending on experience and intuition.

[0003] While a commercial scene goes into a low-growth time and competition intensifies increasingly on the other hand, corporate management is improved and enabling it to raise many profits for management property, such as the fewest possible time, a man, and a facility, is noted increasingly. Thus, in order to raise the productivity of business, it is necessary to perform operating activities by the suitable method.

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EFFECT OF THE INVENTION

[Effect of the Invention] Since not only the dealings evaluation in consideration of the self position but object valuation in consideration of a customer's position is performed and the customer was classified based on the valuation result as this invention was mentioned above, the customer who should evaluate a customer to accuracy more and should do dealings expansion can be clarified, the futility in operating activities can be excluded, and the operating visit force can be distributed proper to various customers.

[0081] Number-of-times desired value classified by customer of a visit which was set up by the desired value setting means according to other features of this invention, Since progress of operating activities was managed using the visit plan drawn up by the planned creation means and the visit result registered by the actual result registration means, and warning was emitted when the degree of the progress to the above-mentioned number-of-times desired value classified by customer of a visit was low By seeing the existence of warning, the customer who should visit by the present top priority can be checked easily, and it can support so that the set-up number-of-times desired value of a visit can be attained certainly.

[0082] Since the business talk plan was drawn up by choosing a suitable thing out of the above-mentioned various business talk process patterns when according to the feature of others of this invention creating various business talk process patterns beforehand among a series of acts performed by operating activities combining two or more arbitrary acts and actually carrying out an individual business talk. A business talk plan can be drawn up easily, the work which must be prepared before the visit to a customer is lessened, and a business manager can make it possible to concentrate on a business talk.

[0083] Since it was made to perform the function in which correlation is defined as the doing-business item chosen on the occasion of formulation of an individual business talk implementation plan automatically according to the feature of others of this invention For example, when the output function of a tool is defined as the above-mentioned function, even if a business manager is not conscious of especially a tool required at the time of business talk implementation, the tool can be certainly obtained now and the work which must prepare before the visit to a customer can be lessened further.

[0084] Since according to the feature of others of this invention an organization hierarchy registration means to register various customers according to the hierarchy is established and it was made to perform a status control for very organization hierarchy, in a customer, detailed management can be performed now to all the men in connection with purchase decision making, and the limited operating visit force can be distributed still more exactly.

[0085] While expressing the number-of-times desired value classified by customer of a visit as a square number according to the feature of others of this invention Since the visit scheduled day and the visit enforcing date were distinguished and expressed as a different color in the above-mentioned rectangular head, and the customer name for every organization hierarchy is distinguished by different color according to the classification result by customer evaluation / classification means and was displayed He can glance at the customer who should concentrate the operating visit force, and the situation of progress of operating activities, and can understand now, creation, an actual result input, etc. of a visit plan can be worked easily intelligibly, and the work of those other than the most important business talk among operating activities can be suppressed now to necessary minimum.

[0086] While displaying on the above-mentioned display means the calendar used in order to input the above-mentioned visit scheduled day and the above-mentioned visit enforcing date according to the feature of others of this invention Since it was made to make it display that the specified date moves into the above-mentioned rectangular head in a screen top when a desired date was specified on the above-mentioned calendar, while being able to draw up a visit plan with game feeling, operation for the creation can be made intelligible.

[0087] By the above thing, according to this invention, the optimal standardization of operating activities can be attained and operating productivity can be raised innovatively.

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TECHNICAL PROBLEM

[Problem(s) to be Solved by the Invention] However, since the method of operating activities had become dependent on the business manager in almost all companies, a business manager's belief, a result, etc. had produced unevenness and futility in operating activities. As for the business manager who improved the actual result and has been said to be excellent in it, it was actual to have devised personally and to have found out the optimal operating method by one's force.

[0005] However, as for a business manager excellent in a company, only a mere handful exists. Therefore, in order to essentially raise operating productivity innovatively as a company, it is necessary to improve the so-called contents of activity of standard business managers other than an excellent business manager.

[0006] this invention is accomplished in view of such the actual condition, attains the optimal standardization of operating activities, and aims at enabling it to raise operating productivity innovatively.

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MEANS

[Means for Solving the Problem] As for the improvement support system in operating productivity of this invention, this invention is characterized by the improvement support system in operating productivity for managing the progress possessing the following while it draws up the plan of operating activities. The data input means for directing various operations, while inputting various data in formulation of the plan of the above-mentioned operating activities, and management of progress. A customer evaluation / classification means to evaluate various customers and to classify the above-mentioned various customers into the bottom of two error criteria with the dealings error criterion which took into consideration the object error criterion in consideration of a customer's position, and the self position using the data inputted from the above-mentioned data input means according to the height of the evaluation result. A desired value setting means to set up the desired value of the number of times of a visit according to customer according to the result of the evaluation and the classification by the above-mentioned customer evaluation / classification means.

[0008] The planned creation means for the place by which it is characterized [of this invention / other] drawing up the visit plan to the above-mentioned various customers, The actual result registration means for registering the actual visit result based on the visit plan drawn up by the above-mentioned planned creation means, Progress of operating activities is managed using the visit result registered by the visit plan and the above-mentioned actual result registration means which were created by the number-of-times desired value classified by customer of a visit and the above-mentioned planned creation means which were set up by the above-mentioned desired value setting means. The degree of the progress to the above-mentioned number-of-times desired value classified by customer of a visit is characterized by providing further the status-control means which emits warning to a low case.

[0009] In order to register two or more doing-business items by defining a required tool in operation for every act of a series to which this invention performs the above-mentioned planned creation means by operating activities, it is characterized by providing the following at the place by which it is characterized [other]. Doing-business item registration means. The business talk process registration means for registering at least one or more business talk process patterns by setting up those turn, while choosing some from two or more doing-business items registered with the above-mentioned doing-business item registration means. A business talk planned creation means to draw up a business talk plan by setting up the operation scheduled day of the doing-business item included in the selected business talk process pattern while choosing any they are from the business talk process patterns registered with the above-mentioned business talk process registration means.

[0010] The place by which it is characterized [of others of this invention] is characterized by the above-mentioned business talk planned creation means possessing a means to perform automatically the function in which correlation is defined as the doing-business item included in the selected business talk process pattern.

[0011] The place by which it is characterized [of others of this invention] possesses further an organization hierarchy registration means to register the above-mentioned various customers according to the hierarchy. Evaluation and a classification of the customer by the above-mentioned customer evaluation / classification means, a setup of the number-of-times desired value classified by customer of a visit by the above-mentioned desired value setting means, It is characterized by performing formulation of the visit plan by the above-mentioned planned creation means, registration of the visit result by the above-mentioned actual result registration means, and the status control by the above-mentioned status-control means for every organization hierarchy registered by the above-mentioned organization hierarchy registration means.

[0012] The number-of-times desired value classified by customer of a visit to which the place by which it is characterized [of others of this invention] was set with the above-mentioned desired value setting means, The visit plan drawn up by the above-mentioned planned creation means, the visit result registered by the above-mentioned actual result registration means, and a display means to display the customer name for every organization hierarchy registered with the above-mentioned organization hierarchy registration means in one screen, While expressing the above-mentioned number-of-times desired value classified by customer of a visit as a square number, the visit scheduled day and a visit enforcing date are distinguished and expressed as a different color in the above-mentioned rectangular head. It is characterized by providing a display-control means to distinguish and display the customer name for every above-mentioned organization hierarchy by different color corresponding to the classification result by the above-mentioned customer evaluation / classification means.

[0013] The place by which it is characterized [of others of this invention] carries out that the specified date makes it display that it moves into the above-mentioned rectangular head in a screen top as the feature in the above-mentioned display-control means, when a desired date is specified on the above-mentioned calendar, while

displaying on the above-mentioned display means the calendar used in order to input the above-mentioned visit scheduled day and the above-mentioned visit enforcing date.

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 OPERATION

[Function] As opposed to having performed conventionally only dealings evaluation which took the self position into consideration chiefly, since this invention consisted of the above-mentioned technical means Object evaluation in consideration of a customer's position will also be performed, and a customer will be classified based on the valuation result, and while evaluating a customer to accuracy more and becoming possible to clarify the customer who should do dealings expansion, it becomes that it is possible in distributing the operating visit force exactly so that the number of times of a visit to the above-mentioned customer who should do dealings expansion may increase.

[0015] Since according to other features of this invention warning comes to be emitted when the visit is not carried out appropriately in spite of having set up the desired value of the number of times of a visit, the customer who should visit by the present top priority can be easily checked by seeing the existence of the warning.

[0016] Since what is necessary is just to choose a suitable thing out of the above-mentioned various business talk process patterns in case according to the feature of others of this invention various business talk process patterns are beforehand created among a series of acts performed by operating activities combining two or more arbitrary acts and an individual business talk is actually carried out, it becomes possible to draw up an individual business talk implementation plan simply.

[0017] Since the function related with the doing-business item included in the business talk process pattern chosen on the occasion of formulation of an individual business talk implementation plan is automatically performed when according to the feature of others of this invention it is possible to define beforehand functions, such as for example, a tool output and an operation result mark input, as various doing-business items, respectively and the function is defined. Even if a business manager is not conscious of especially a tool required at the time of business talk implementation, the tool comes to be obtained certainly.

[0018] every organization hierarchies of all on a customer and in connection with [according to the feature of others of this invention] purchase decision making — management — ***** — it becomes possible to become things and to distribute the limited operating visit force more exactly

[0019] According to the feature of others of this invention, the number of times of a visit is made [many], the customer who should do dealings expansion, the situation of progress of operating activities, etc. glance, and it comes to understand, and in order to raise operating productivity, a suitable visit plan can be drawn up easily.

[0020] According to the feature of others of this invention, since the date moves according to the animation effect in the screen top, the operation at the time of being able to draw up a visit plan now with game feeling, and drawing up a visit plan also becomes intelligible.

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EXAMPLE

[Example] As a result of an applicant's investigating over a long period of time, in order to raise operating productivity in the limited operating force, it became clear that it is necessary to realize the following three things continuously.

** Clarify the customer (customer in whom dealings expansion is possible) who wants to carry out dealings expansion, and make the customer concentrate the operating force.

** Collect the information in connection with not one-way promotion but the business chance of dealings expansion from a customer, and aim at an order received by the proposal which utilized it.

** Build a margin so that a business manager can concentrate on operating activities.

[0022] In order to realize three concepts of the above-mentioned ** - **, it becomes important to carry out the following three points.

- Distribute the operating visit force to the customer who wants to carry out dealings expansion proper.
- Carry out planned visit activities to all the men in connection with a customer's purchase decision making.
- It has a scenario for dealings expansion and carry this out intentionally.

The improvement support system in operating productivity of this example has the following four functions which support carrying out the above three points, as shown in drawing 16.

[0023] (1) A number-of-times of operating visit proper distribution functional book function is a function for distributing to the customer who wants to carry out dealings expansion of the limited operating visit force proper. That is, in this function, while setting up a target, in order to realize the set-up target, a visit plan is drawn up periodically, and it supports visiting as planned.

[0024] (2) The number of the points which should perform the function manager operating visit for [classified by organization hierarchy] a visit is not one about one customer. That is, not only a customer's person in charge but its manager of having a contact periodically with all the men in connection with a partner's purchase decision making etc. is very effective. This function registers altogether the customer who distributes the operating force according to the hierarchy, manages actions, such as the number of times of a visit, according to each hierarchy, and offers thing support.

[0025] (3) The act which should be performed there, and its schedule, i.e., a certain power process, exist in a business talk at a general business talk implementation support function. Referring to the process of a certain patterned power business talk, this function draws up the plan of an individual business talk simply, and supports the activity based on the plan.

[0026] (4) Describe above a planned operating-activities support functional book function. (1) - (3) While a business manager and a manager are always conscious of each function, it is the function which supports carrying out intentionally. That is, this function is described above. (1) - (3) It is a function for combining each function and performing intelligibly an input, analysis, etc. of formulation of a visit plan, and the execution result of the plan easily.

[0027] Hereafter, one example of this invention is explained based on a drawing. Drawing 1 is described above. (1) - (4) It is the functional block diagram showing the element-feature of the improvement support system in operating productivity by this example for realizing each function. Moreover, drawing 2 is drawing showing the hardware composition for carrying out concretely each functional block shown in drawing 1.

[0028] As shown in drawing 2, the improvement support system in operating productivity of this example is realized by the personal computer system which has generally spread. That is, as for a keyboard and 23, in this drawing, the main part of a personal computer with which 21 built in CPU, ROM, RAM, etc., and 22 are [a mouse and 24] display units.

[0029] 25 is the tool database storage section and the various tools used for operating activities are memorized. As the above-mentioned various tools, the interest attachment tool to a customer, a reaction inquiry tool, the interest attachment status-control sheet classified by customer, a business chance information gathering tool, a key man valuation tool, etc. can be mentioned, for example.

[0030] 26 is the status-control data-storage section classified by customer, and the progress data based on the contents of a plan of the operating activities inputted by the visit plan inputted by the business manager, a visit result, or the manager etc. are memorized. 27 is the dealings actual result data-storage section, and the data about a dealings actual result with a customer are memorized.

[0031] In addition, these tool database storage sections 25, the status-control data-storage section 26 classified by customer, and the dealings actual result data-storage section 27 consist of a hard disk, a floppy disk, etc.

[0032] 28 is the required tool creation section, actually creates the tool chosen from the various tools memorized by the above-mentioned tool database storage section 25, and consists of printers for printing the documents addressed to a customer for example, etc.

[0033] A business manager draws up a operating plan using the personal computer system of such composition, carries out the plan, and carries out operating activities by valuating an execution result. Thereby, to the former depending on experience of a business manager or intuition, by this example, standardization of operating activities can be attained and operating productivity can be raised now.

[0034] Next, in drawing 1, 1 is the data input section and is constituted by the keyboard 22 and mouse 23 which were shown in drawing 2. 2 is customer evaluation / classification section, and evaluates and classifies various customers under a fixed error criterion. Hereafter, the method of this customer evaluation is explained based on drawing 3 shown below.

[0035] this example is estimating the customer from two sides of object evaluation and dealings evaluation so that clearly from drawing 3. As evaluation criteria of object evaluation, there are sales, a manager's motivation, possibilities, a site condition, etc., and these items are grasped as a thing in consideration of the position of a partner company (customer), for example. Moreover, as evaluation criteria of dealings evaluation, there are dealings, a rate of a gross income, a pulse duty factor, recovery conditions, etc., and these items are grasped as a thing in consideration of the position of a self-company, for example.

[0036] Moreover, customer evaluation / classification section 2 of this example divides the customer into four classifications based on the evaluation performed as mentioned above. That is, as shown in drawing 3, according to the height of each evaluation, the customer is divided into four classifications, an improvement management visitor, an important management visitor, a semi-important management visitor, and a drifting-management visitor, for the result of the dealings evaluation of the result of object evaluation for a vertical axis for the horizontal axis.

[0037] Here, although the result of dealings evaluation is low, the result of object evaluation is a high customer, and an improvement management visitor will mean a customer's thing which dealings may expand further, if a certain improvement is added to operating activities. Moreover, each of results of object evaluation and results of dealings evaluation is high customers, and an important management visitor means the customer who moreover has possibilities at a good customer.

[0038] Moreover, although the result of dealings evaluation is high, the result of object evaluation is a low customer, and although a semi-important management visitor is a good customer, he means the customer who lacks in possibilities. Furthermore, each of results of object evaluation and results of dealings evaluation is low customers, and a drifting-management visitor means a customer without possibilities.

[0039] Drawing 4 is drawing showing the procedure of the above customer evaluations and a classification. Namely, operators, such as a manager, input the evaluating point of five-point full marks for every item of object evaluation and dealings evaluation using the data input section 1 of drawing 1 with reference to an evaluation table like drawing 4 (a) created beforehand. This obtains a customer evaluation result like drawing 4 (b).

[0040] In addition, on the occasion of this evaluation, an evaluation table which is different whether a customer is a retail store or you are a mass retailer is used. Moreover, if the improvement support system in operating productivity possesses the evaluation table itself and a manager actually inputs a numeric value into each item, you may constitute so that it may be automatically transposed to an evaluating point.

[0041] If the evaluating point of each item is inputted, the sum total of the evaluating point of object evaluation and the sum total of the evaluating point of dealings evaluation will be separately calculated for every customer by customer evaluation / classification section 2, respectively, and each customer will be divided into four classifications when the result is plotted by the system of coordinates shown in drawing 4 (c). The classification result shown in drawing 4 (c) is displayed on the display 8 of drawing 1, and can also be printed by the printing section 9. This display 8 corresponds to the display unit 24 of drawing 2, and the printing section 9 corresponds to the required tool creation section 28.

[0042] In addition, although it is obtained when the boundary of each classification shown by the dotted line in drawing 4 (c) makes all the items three points, this can be changed arbitrarily. Moreover, it is also possible not to add the evaluating point of each item simply, but to make it add, carrying out weighting.

[0043] By the way, although the easy sales management tool was proposed from before, this sales management tool was what performs only dealings evaluation chiefly. On the other hand, in this example, object evaluation is also performed, a customer's position is also taken into consideration and evaluation and the classification are performed. By doing in this way, a customer can be evaluated more to accuracy and the customer who should expand dealings, the customer who should maintain, or the customer who should do dependent on the result can be easily judged now.

[0044] It returns and explains to drawing 1 again. 3 is the desired value setting section and sets up the desired value of the number of times of a month-long visit according to customer. That is, a business manager or a manager defines a concrete dealings budget numeric value with reference to the result of the evaluation and the classification by the above-mentioned customer evaluation / classification section 2, and the dealings actual result of the past memorized by the dealings actual result data-storage section 27, and inputs the desired value of the optimal number of times of the month-long visit classified by customer for realizing this using the data input section 1.

[0045] In addition, in order to make ***** which manager certainly the desired value of the set-up number of times of a visit, the business manager computes the number of cases the total which it can visit to monthly, and

enables it to set up the number of times of a visit at this example only in the range which is not [upper **] about it. That is, if the number-of-times desired value of a month-long visit according to customer is inputted as mentioned above, the sum total of the number of times of a month-long visit will be displayed on the number-of-times check column 51 of a visit of the screen shown in drawing 5, and the visit average number of cases per day will be displayed simultaneously. Then, desired value is adjusted so that it may not turn around the number of cases a top the total to which the sum total of the number of times of a month-long visit can visit a busin ss manager.

[0046] Thus, unlike an old sales management tool, in this xample, the featur is in th place it is mad to set up the number of times of a visit which should be performed to the dealings budget numeric value reflecting the intention of how to want to act as the customer based on a past dealings actual result and a past customer evaluation result, and the well which realizes it.

[0047] Then, it can distribute now to the customer who wants to carry out dealings expansion of the operating visit force proper by setting up desired value so that the number of times of a visit may increase to the customer who clarified and who wants to carry out dealings expansion by above evaluation and classifications. In addition, in order to raise operating productivity efficiently, it is desirable to distribute the operating force in order of an improvement management visitor, an important management visitor, a semi- important management visitor, and a drifting- management visitor.

[0048] Through the status-control section 6, the desired value of the number of times of the month-long visit classified by customer set up by the above-mentioned desired value setting section 3 is given to the status-control data-storage section 26 classified by customer, and is memorized. Moreover, the desired value of the above- mentioned number of times of the month-long visit classified by customer memorized by the status-control data-storage section 26 classified by customer is given to the display-control section 7 through the status-control section 6, and is displayed on a display 8 under control by this display-control section 7.

[0049] Drawing 6 is drawing showing an example of the screen displayed on the above-mentioned display 8, and is drawing showing the month-long visit schedule / actual result input screen for business managers. The desired value of the number of times of a visit set up as mentioned above is reflected and displayed on the schedule / actual result display area 61 in drawing 6. That is, in above-mentioned schedule / actual result display area 61, field 61a enclosed with the thick line expresses the desired value of the number of times of a visit (this field is hereafter called number-of-times viewing area of a visit), and the number of **s in this field 61a corresponds to the desired value of the number of times of a visit.

[0050] Again, in drawing 1, 4 is the customer hierarchy registration section and registers the customer who distributes the operating force according to the hierarchy. As mentioned above, the points which should perform a operating visit are [in / customers, such as not only one person in charge but its superior official, and a man of on 's related post, / customer / one] / all the men in connection with purchase decision making.

[0051] Then, the customer hierarchy registration section 4 is formed and it enables it to register its vertical relation with the man in connection with purchase decision making in this example, so that it may illustrate to drawing 7. In addition, a business manager or a manager performs procedure required for registration using the data input section 1.

[0052] If a customer hierarchy is registered like the above-mentioned example of drawing 7, as shown in drawing 8, th customer name registered according to the hierarchy will come to be displayed on the customer name area 81 of a month-long visit schedule / actual result input screen together with the order to which an activity wait is applied based on the customer evaluation result by the above-mentioned customer evaluation / classification section 2. Although these customer names are not clear from drawing 8 at this time, it is expressed as a different color according to the classification result (any of an important management visitor, an improvement management visitor, a semi- important management visitor, and a drifting-management visitor are they?) by the above-mentioned customer evaluation / classification section 2.

[0053] Moreover, creation, its actual result total, etc. of a setup of the desired value which said previously that a customer hierarchy is registered, and the visit plan described later can be performed now according to a customer hierarchy.

[0054] Subsequently, 5 is the planned creation section and draws up a business manager's visit plan (a business talk pr cess is included). If a business manager or a manager inputs various data using the data input section 1 with reference to the above-mentioned month-long visit schedule / actual result input screen displayed on a display 8 based on the desired value set up by the above-mentioned desired value setting section 3, the above-mentioned planned creation section 5 will draw up a visit plan using this inputted data.

[0055] In case a visit plan is drawn up, the work of burying the visit scheduled day is done on each ** in number- f- times viewing-area of visit 61a shown in drawing 6 (since it is what is performed after a schedule input performs an actual result input, the screen of actual result input mode is shown in drawing 6, and the screen of schedule input mode is shown in drawing 8). As operation, first, a schedule / actual result input button 63 is operated, and schedule input mode is chos n. In addition, when schedule input mode is ch sen, the dat in the date s lection ar a 62 is blue, and it is displayed, and when actual result input mode is chosen, it is displayed in red.

[0056] Next, in the date selection area 62, if a mouse cursor is placed on the date which is planning the visit and mous button is clicked, the date moves to a schedule / actual result display ar a 61 automatically acc rding t th animation ffect, and is buried in an order from the head by each ** in number-of-times vi wing-ar a of visit 61a. In this way, an input of the dat f a visit schedule displays the sum total of the visit number of cases for with [ev ry] a day n the visit number-of-cases area 64. Thereby, as compared with th average visit number of cases

per [which a business manager can visit] day, it can check whether it is realizable.

[0057] In addition, the date of a blue display is expressed with the usual number on the convenience of a drawing, and in number-of-times viewing-area of visit 61a, and the date of a red display is expressed with the number with O. The number of a red display shows the visit enforcing date inputted by the procedure mentioned later. Thus, in this example, since a color is changed and it is made to display the date of a visit schedule, and the date of a visit enforcing date, both are distinguishable at a glance.

[0058] Moreover, the portion shown with the slash in the above-mentioned number-of-times viewing-area of visit 61a is a field currently displayed in yellow in fact. This field has few dates which it actually visited to the number-of-times desired value of a month-long visit shown by the number of **s, and it is displayed in order that the degree of progress may give warning to a low case, and the customer who should visit to top priority at present, and its number of times are shown. Therefore, the field of this yellow display increases, so that it goes to the end of the month.

[0059] Thus, in this example, in case a visit plan is drawn up, by seeing the number of **s in number-of-times viewing-area of visit 61a, the number-of-times desired value of a month-long visit can be checked easily, and the consciousness of distributing with the visit scheduled day more mostly to a customer with many **s can be worked. Moreover, to the customer to whom warning of a yellow display is carried out, the consciousness of setting up with the visit scheduled day by top priority can also be worked. For this reason, the formulation of a visit plan and the check of an actual result which always took into consideration achievement of the number-of-times desired value of a visit can be performed now.

[0060] As mentioned above, the planned creation section 5 also performs creation of a business talk process. Although there are various actions in operating activities, these actions are continuing and what arranged those actions in purpose-oriented becomes a business talk process. That is, having a business talk turns over in order the bunch of the card which indicated various actions, and it is transposed to carrying out the written content of the card. The planned creation section 5 of this example enables it to make creation and the determination of turn of a card simply on a personal computer.

[0061] That is, the composition for creating the business talk process of the planned creation section 5 has become like drawing 9. Hereafter, the procedure which creates a business talk process is explained, referring to the composition of this drawing 9.

[0062] First, in the doing-business item registration section 91 of drawing 9, two or more action cards (doing-business item) are created for every action of a series performed by operating activities by defining a required to (for example, information with which a customer should be provided and information which should be collected from a customer) in operation. Here, as shown in drawing 10, while carrying out the keyboard entry of the required tool name in a doing-business name or a business talk, a doing-business classification name and a business talk progress classification name are chosen from the drop down list (not shown) set up beforehand.

[0063] Next, in the business talk process registration section 92, some are arbitrarily chosen from two or more action cards created in the above-mentioned doing-business item registration section 91, and a business talk process pattern (business talk classification) is registered by setting up those selected turn and operation periods of an action card. Moreover, on the occasion of the registration, in case a schedule is created, the action used as criteria is defined.

[0064] As shown in drawing 11, while specifically carrying out the keyboard entry of the business talk classification name to the business talk classification area 111, the action card which constitutes a business talk process out of the doing-business item area 112 is chosen arbitrarily, and the selected action card is stuck on the doing-business plan area 113 in order. And an operation period is set up for every doing business by inputting into the cell 114 of each week of doing business numerically how many times the selected action is performed.

[0065] If a business manager hits carrying out an individual business talk, while choosing a suitable thing in the business talk planned creation section 93 out of the business talk process pattern (business talk classification) registered in the above-mentioned business talk process registration section 92, an individual business talk implementation plan is drawn up by setting up the date of a criteria action.

[0066] That is, as shown in drawing 12, while carrying out the keyboard entry of the business talk name to the business talk area 121, the business talk process pattern (business talk classification) registered in the above-mentioned business talk process registration section 92 in the business talk classification area 122 is chosen from a drop down list. Then, doing business, its number of times of operation, and an operation period are automatically displayed on the doing-business plan area 113.

[0067] Next, while choosing a candidate customer from a drop down list in the candidate customer area 123, the doing-business item (action card) already registered in the criteria doing-business item area 124 is chosen from a drop down list. And if a date of record is inputted into the date-of-record area 125 and a setup key 126 is pushed, the doing-business plan area 113 will be automatically set up in accordance with doing business which carried out [above-mentioned] selection with the date of record which carried out [above-mentioned] the input.

[0068] As mentioned above, in this example, since what is necessary is just to choose a suitable thing out of the above-mentioned various business talk process patterns in case various business talk process patterns are beforehand created among a series of actions performed by operating activities combining two or more arbitrary actions and an individual business talk is actually carried out, an individual business talk implementation plan can be drawn up easily.

[0069] In addition, in case the visit plan mentioned above in the planned creation section 5 is drawn up, the drawn-

up business talk plan can be referred to by list. Drawing 13 shows an example of the reference screen. In drawing 13, the business talk plan set up based on the screen of drawing 12 is displayed on the upper part of the business talk progress table 131.

[0070] About four weeks which the plan actual result column of this business talk progress table 131 begins, the action card which should be performed to each week action card field 132 just below for every week is shown. Although the action card shown in each of this week action card field 132 carried out the plan, it is a card in which the action which has not been carried out yet is shown. Therefore, if this display is seen, the action which should be done now can be judged exactly.

[0071] Then, in each week action card field 132, a business manager sets up the action which should be done from now on by choosing the date of the right schedule input column 133 while choosing the action card with which the week near present is left behind by mouse click operation. Then, the selected action card is displayed on the bottom of the above-mentioned date.

[0072] Moreover, if a business talk plan is registered in this way, the date which planned the business talk plan will be blue, and will be expressed as the month-long visit schedule / actual result input screen at the time of the schedule input mode shown in drawing 8. Furthermore, the number of cases of the business talk registered now is expressed in the business talk number-of-cases area 82 as this month-long visit schedule / actual result input screen.

[0073] By this looking at this business talk number of cases, the number of **s of the white showing the number-of-times desired value of a month-long visit, and the sum total of the date of the customer name by which it was indicated by classification by color, and a visit schedule / actual result, and the visit number of cases It can judge from two viewpoints ["visit / where / in order to perform the visit activities with sufficient balance / it"] "where it should visit in, order to manage the business talk currently held now", consequently the customer who should visit while looking at the whole balance can be judged exactly.

[0074] In addition, when the required tool is beforehand registered in the above-mentioned doing-business item registration section 91 in operation of the planned action card, it is automatically printed by the printing section 9. since a customer name etc. can be put into the tool in that case — ON — a RIYU tool can be created

[0075] On the other hand, a business manager registers the visit result as an actual result using the actual result registration section 10, when the planned operating activities are actually performed. The list of the business talks registered also at the time of the input of this visit result can be referred to. That is, in the month-long visit schedule / actual result input screen shown in drawing 6, if actual result input mode is chosen and the mouse click of the date in the date selection area 62 is carried out, the same visit schedule / actual result input screen as drawing 13 as shown in drawing 14 will be displayed.

[0076] In drawing 14, a business talk plan is displayed on the upper part of the business talk progress table 131 like the screen of drawing 13. Moreover, if the action card actually performed out of the action card shown in the right actual result input column 141 is chosen and the blank section under it is clicked, the character of a card will change to blue shell red, and will be registered as an actual result. In this way, the registered actual result is automatically reflected in the lower part of the plan actual result column of the business talk progress table 131, and is displayed on it. And if the screen shown in this drawing 14 is closed, it will return to the screen shown in drawing 6. At this time, the blue schedule display has changed to the red actual result display automatically.

[0077] Moreover, in the improvement support system in operating productivity of this example, it can indicate by list, or the situation of business talk progress can be printed, and it can use for management. Drawing 15 is drawing showing the list display screen of business talk progress. The display of the plan actual result column of the business talk progress table 131 of the screen shown in drawing 14 is expressed as this screen sequentially from the high thing of the degree of business talk progress.

[0078] Since planned implementation of two or more business talks is not only supportable, but data can be passed to the personal digital assistant equipment which is not illustrated through a floppy disk etc. by the business talk implementation support function of this example which was described above, in business talk implementation, a required tool can be created on that spot, or the result after operation can be totaled. For this reason, there is a merit that a required check and required action can be performed easily in a operating site.

[0079] In addition, customer evaluation / classification section 2, the desired value setting section 3, the customer hierarchy registration section 4, the planned creation section 5, the status-control section 6, and the display-control section 7 of drawing 1 explained above are constituted by CPU, ROM, RAM, etc. which are built in the main part 1 of a personal computer shown in drawing 2 and which are not illustrated.

[Translation done.]

* NOTICES *

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- 1.This document has been translated by computer. So the translation may not reflect the original precisely.
- 2.**** shows the word which can not be translated.
- 3.In the drawings, any words are not translated.

DESCRIPTION OF DRAWINGS

[Brief Description of the Drawings]

[Drawing 1] It is the functional block diagram showing the element-feature of the improvement support system in operating productivity of this invention.

[Drawing 2] It is drawing showing the hardware composition for carrying out concretely each functional block shown in drawing 1.

[Drawing 3] It is drawing for explaining evaluation and classification of the customer by customer evaluation / classification section.

[Drawing 4] It is drawing showing the procedure of evaluation and a classification of the customer by customer evaluation / classification section.

[Drawing 5] It is drawing showing the setting screen of the number-of-times desired value of the month-long visit classified by customer.

[Drawing 6] It is drawing showing a month-long visit schedule / actual result input screen (actual result input mode).

[Drawing 7] It is drawing showing the registration screen of a customer hierarchy.

[Drawing 8] It is drawing showing a month-long visit schedule / actual result input screen (schedule input mode).

[Drawing 9] It is the block diagram showing the composition of the planned creation section.

[Drawing 10] It is drawing showing the registration screen of a doing-business item (act card).

[Drawing 11] It is drawing showing the registration screen of a business talk process pattern (business talk classification).

[Drawing 12] It is drawing showing the creation screen of an individual business talk implementation plan.

[Drawing 13] It is drawing showing a visit schedule / actual result input screen (schedule input mode).

[Drawing 14] It is drawing showing a visit schedule / actual result input screen (actual result input mode).

[Drawing 15] It is drawing showing the business talk progress list display screen.

[Drawing 16] It is drawing showing the relation of the function realized by the improvement support system in operating productivity of this example.

[Description of Notations]

- 1 Data Input Section
- 2 Customer Evaluation / Classification Section
- 3 Desired Value Setting Section
- 4 Customer Hierarchy Registration Section
- 5 Planned Creation Section
- 6 Status-Control Section
- 7 Display-Control Section
- 8 Display
- 9 Printing Section
- 10 Actual Result Registration Section
- 21 Main Part of Personal Computer
- 22 Keyboard
- 23 Mouse
- 24 Display Unit
- 25 Tool Database Storage Section
- 26 Status-Control Data-Storage Section Classified by Customer
- 27 Dealings Actual Result Data-Storage Section
- 28 Required Tool Creation Section
- 91 Doing-Business Item Registration Section
- 92 Business Talk Process Registration Section
- 93 Business Talk Planned Creation Section

[Translation done.]

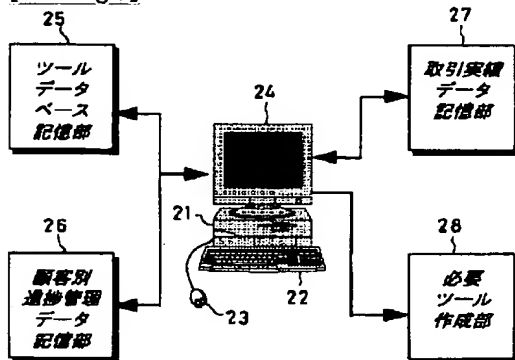
* NOTICES *

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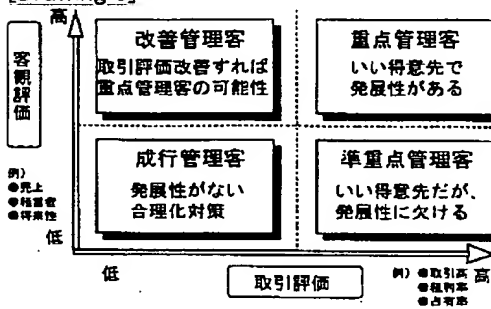
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2. **** shows the word which can not be translated.
3. In the drawings, any words are not translated.

DRAWINGS

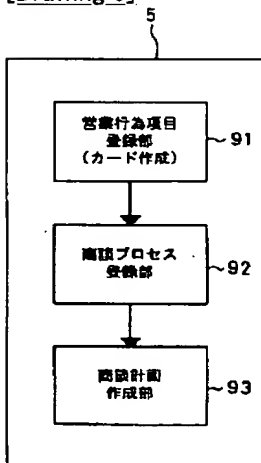
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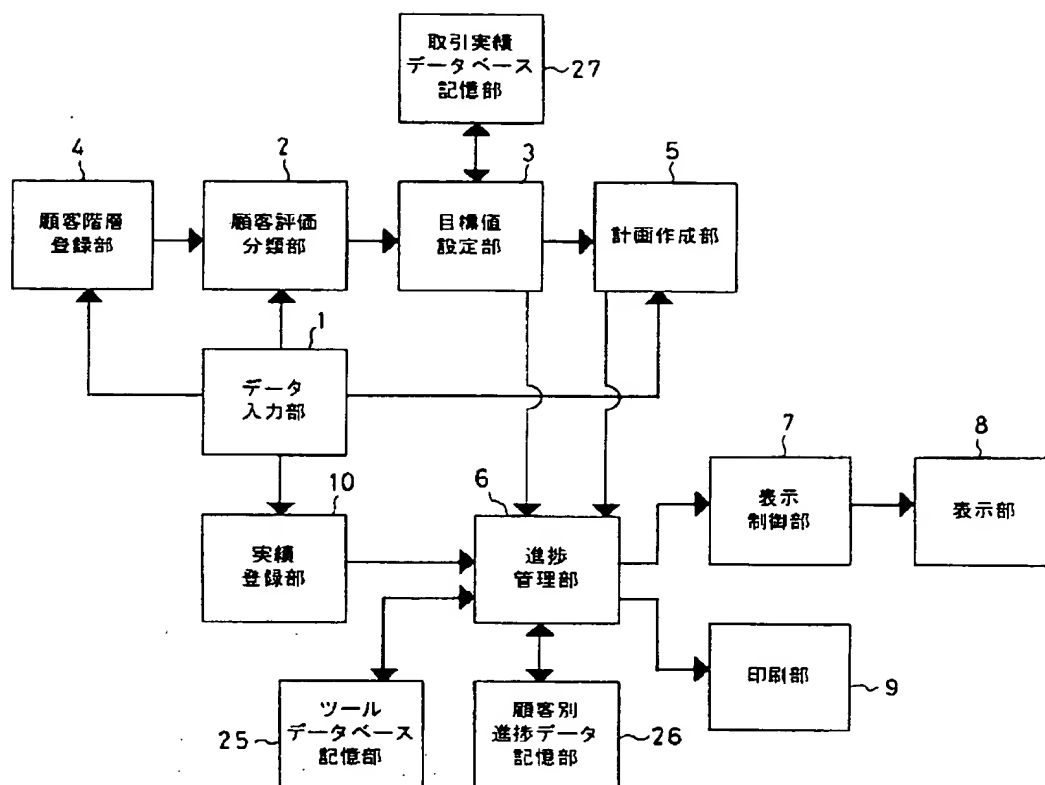
[Drawing 3]



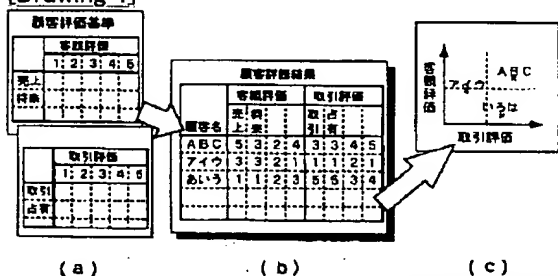
[Drawing 9]



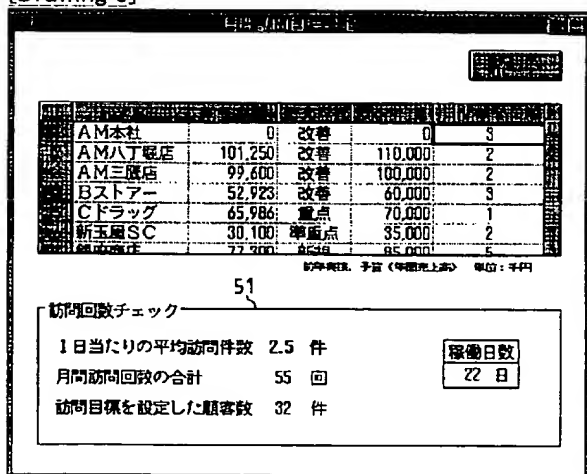
[Drawing 1]



[Drawing 4]



[Drawing 5]



[Drawing 10]

営業行名 営業行区分 商談通話分類 アドイン機能

興味付け2 興味付け アタック Tool1.exe

[Drawing 6]

月間訪問予定／実績入力

営業部1課 日本 太郎
 1995年4月5日(木)

大客		維持客		情報系													
顧客分類	顧客名	予定／実績表示										実績入力					
		1	2	3	4	5	6	7	8	9	10	8	月	火	水	金	土
一般小売店	よしだや	2	3	4								2	3	4	5		
一般小売店	東京商事	5	6	7								2	3	4	5		
一般小売店	若田屋	1	2	3								2	3	4	5		

61a
62

●：重点 ◎：改善 ○：準重点 ○：成行 ◎：新進

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0	2	1	0																						
1	0	0	0																						
0	0	0	0																						
1	2	1	0																						

64

[Drawing_7]

山田野長
(監、計、支書)

野木店長
(監、)

佐藤店長
(監、)

[Drawing 15]

[illegible]

[Drawing 8]

月曜訪問予定/実績入力

予定印刷 閉じる

81 4月 82 1995年4月5日(木) 61

拡大客 維持客 情報源

顧客分類	顧客名	商談件数	予定/実績表示										予定入力							
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貴飯店	AM八丁	2															5	6	7	8
貴飯店	AM三座店	1															5	6	7	8
貴飯店	日ストア	3															5	6	7	8
貴飯店	CDラック	1															5	6	7	8
貴飯店	新玉屋SC	1															5	6	7	8
貴飯店	銀座商店	1															5	6	7	8

● : 重点 ● : 改善 ● : 準重点 ● : 成行 ○ : 新展

拡大客 維持客 情報源

訪問件数	1	2	0	0
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訪問件数	0	0	0	0
合計	1	2	0	0

64

[Drawing 11]

商談分類の登録

新規 開く 登録 削除 閉じる

商談分類名 新製品商談 113

営業行為項目 112

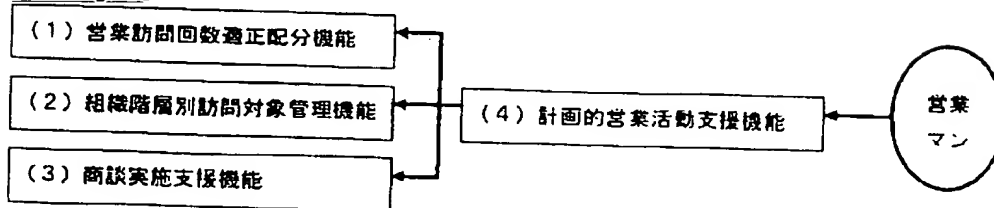
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>>選択 取消<<

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1 興味付け1	1	1																															
2 興味付け2	1	1																															
3 興味付け3	2	1	1																														
4 ヒアリング	2	2																															
5																																	
6																																	

114

[Drawing 16]



[Drawing 12]

商談名		災害用品セール	
商談分類		新製品商談	
対象顧客		Bストアー	
基準日		93年04月02日	
基準営業行為項目		興味付け3	
高次開始日		95年04月02日	

	営業行為	実施回数	4月目	5月目	6月目	7月目	8月目
1	興味付け1	1	1				
2	興味付け2	1	1				
3	興味付け3	2	1	1			
4	ヒアリング	2	2				
5	デモ	1	1				
6	提案	1	1				
	見送り	1	1				

[Drawing 13]

[illegible]

[Drawing 14]

[illegible]

[Translation done.]

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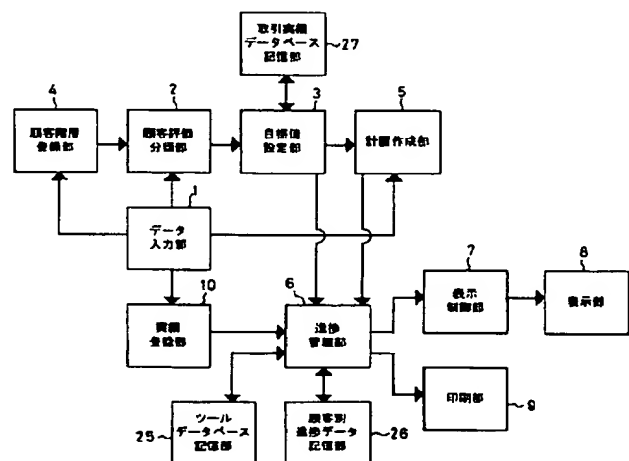
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(54) 【発明の名称】 営業生産性向上支援システム

(57) 【要約】

【目的】 営業活動の最適な標準化を図り、営業生産性を革新的に向上させることができるようにする。

【構成】 データ入力部1より入力されるデータを用いて、顧客の立場を考慮した客観評価基準と自己の立場を考慮した取引評価基準との2つの評価基準の下に種々の顧客を評価し、その評価結果の高低に応じて種々の顧客を分類する顧客評価・分類部2と、顧客評価・分類部2による評価・分類の結果を参照して顧客別の訪問回数の目標値を設定する目標値設定部3とを設け、自己の立場を考慮した取引評価だけでなく、顧客の立場を考慮した客観評価も行い、その評価結果に基づいて顧客を分類するようにすることにより、顧客の評価をより正確に行って取引拡大すべき顧客を明確にすることができるようにし、営業活動における無駄を省いて営業訪問力を種々の顧客に適正に配分することができるようにする。



【特許請求の範囲】

【請求項1】 営業活動の計画を作成するとともに、その進捗を管理するための営業生産性向上支援システムであって、

上記営業活動の計画の作成および進捗の管理にあたって種々のデータを入力するとともに種々の操作を指示するためのデータ入力手段と、

上記データ入力手段より入力されるデータを用いて、顧客の立場を考慮した客観評価基準と自己の立場を考慮した取引評価基準との2つの評価基準の下に種々の顧客を評価し、その評価結果の高低に応じて上記種々の顧客を分類する顧客評価・分類手段と、

上記顧客評価・分類手段による評価・分類の結果に応じて顧客別の訪問回数目標値を設定する目標値設定手段とを具備することを特徴とする営業生産性向上支援システム。

【請求項2】 上記種々の顧客への訪問計画を作成するための計画作成手段と、

上記計画作成手段により作成された訪問計画に基づく実際の訪問結果を登録するための実績登録手段と、

上記目標値設定手段により設定された顧客別訪問回数目標値、上記計画作成手段により作成された訪問計画および上記実績登録手段により登録された訪問結果を用いて営業活動の進捗を管理し、上記顧客別訪問回数目標値に対する進捗の度合いが低い場合に警告を発するようにする進捗管理手段とを更に具備することを特徴とする請求項1に記載の営業生産性向上支援システム。

【請求項3】 上記計画作成手段は、営業活動で行う一連の行為ごとに実施にあたって必要なツールを定義することにより複数の営業行為項目を登録するための営業行為項目登録手段と、

上記営業行為項目登録手段で登録した複数の営業行為項目の中から幾つかを選択するとともにそれらの順番を設定することにより、少なくとも1つ以上の商談プロセスパターンを登録するための商談プロセス登録手段と、

上記商談プロセス登録手段で登録した商談プロセスパターンの中から何れかを選択するとともに、その選択した商談プロセスパターン中に含まれる営業行為項目の実施予定日を設定することにより商談計画を作成する商談計画作成手段とを有することを特徴とする請求項2に記載の営業生産性向上支援システム。

【請求項4】 上記商談計画作成手段は、選択した商談プロセスパターン中に含まれる営業行為項目に関連付けが定義されている機能を自動実行する手段を具備することを特徴とする請求項3に記載の営業生産性向上支援システム。

【請求項5】 上記種々の顧客をその階層別に登録する組織階層登録手段を更に具備し、

上記顧客評価・分類手段による顧客の評価・分類、上記目標値設定手段による顧客別訪問回数目標値の設定、上

記計画作成手段による訪問計画の作成、上記実績登録手段による訪問結果の登録、および上記進捗管理手段による進捗管理を、上記組織階層登録手段によって登録された組織階層ごとに行うようにしたことを特徴とする請求項2～4の何れか1項に記載の営業生産性向上支援システム。

【請求項6】 上記目標値設定手段で設定された顧客別訪問回数目標値、上記計画作成手段により作成された訪問計画、上記実績登録手段により登録された訪問結果、および上記組織階層登録手段で登録された組織階層ごとの顧客名を1つの画面内に表示する表示手段と、

上記顧客別訪問回数目標値を四角の数で表示するとともに、訪問予定日と訪問実施日とを上記四角の中に異なる色で区別して表示し、上記組織階層ごとの顧客名を上記顧客評価・分類手段による分類結果に対応して異なる色で区別して表示するように制御する表示制御手段とを具備することを特徴とする請求項2～5の何れか1項に記載の営業生産性向上支援システム。

【請求項7】 上記表示制御手段は、上記訪問予定日および上記訪問実施日を入力するために使用するカレンダーを上記表示手段に表示させるとともに、上記カレンダー上で所望の日付が指定されたときに、その指定された日付が上記四角の中に画面上を移動していくように表示させることを特徴とする請求項6に記載の営業生産性向上支援システム。

【発明の詳細な説明】**【0001】**

【産業上の利用分野】 本発明は営業生産性向上支援システムに関し、特に、営業マンが行う営業活動を効率よく行うことを支援するために用いて好適なものである。

【0002】

【従来の技術】 一般に、営業活動は人間が人間に対して行うことであるため、標準化あるいはシステム化が困難であった。このため、販売管理や製造管理、あるいは組織管理などの分野で情報化が進む一方で、多くの営業マンは経験と勘に頼りながら営業活動を行っていた。

【0003】 一方、市場が低成長時代に入り、競争がますます激化していく中で、企業経営が見直され、できるだけ少ない時間、人、設備などの経営資産で多くの収益を上げられるようにすることが着目されるようになってきている。このように営業の生産性を向上させるためには、適切な方法で営業活動を行うことが必要になってくる。

【0004】

【発明が解決しようとする課題】 しかしながら、営業活動の方法は、ほとんどの企業で営業マンまかせになっていたため、営業マンの思い込みや成り行きなどが営業活動にむらや無駄を生じていた。その中で、実績を上げ、優秀だと言われてきた営業マンは、自分で工夫をし、自分の力で最適な営業方法を見つけ出しているのが現実で

あった。

【0005】ところが、企業の中で優秀な営業マンはほんの一握りしか存在しない。したがって、企業として本質的に営業生産性を革新的に向上させるためには、優秀な営業マン以外のいわゆる標準的な営業マンの活動内容を見直す必要がある。

【0006】本発明は、このような実情に鑑みて成されたものであり、営業活動の最適な標準化を図り、営業生産性を革新的に向上させることができるようにすることを目的とする。

【0007】

【課題を解決するための手段】本発明の営業生産性向上支援システムは、営業活動の計画を作成するとともに、その進捗を管理するための営業生産性向上支援システムであって、上記営業活動の計画の作成および進捗の管理にあたって種々のデータを入力するとともに種々の操作を指示するためのデータ入力手段と、上記データ入力手段より入力されるデータを用いて、顧客の立場を考慮した客観評価基準と自己の立場を考慮した取引評価基準との2つの評価基準の下に種々の顧客を評価し、その評価結果の高低に応じて上記種々の顧客を分類する顧客評価・分類手段と、上記顧客評価・分類手段による評価・分類の結果に応じて顧客別の訪問回数の目標値を設定する目標値設定手段とを具備することを特徴とする。

【0008】本発明の他の特徴とするところは、上記種々の顧客への訪問計画を作成するための計画作成手段と、上記計画作成手段により作成された訪問計画に基づく実際の訪問結果を登録するための実績登録手段と、上記目標値設定手段により設定された顧客別訪問回数目標値、上記計画作成手段により作成された訪問計画および上記実績登録手段により登録された訪問結果を用いて営業活動の進捗を管理し、上記顧客別訪問回数目標値に対する進捗の度合いが低い場合に警告を発するようにする進捗管理手段とを更に具備することを特徴とする。

【0009】本発明のその他の特徴とするところは、上記計画作成手段は、営業活動で行う一連の行為ごとに実施にあたって必要なツールを定義することにより複数の営業行為項目を登録するための営業行為項目登録手段と、上記営業行為項目登録手段で登録した複数の営業行為項目の中から幾つかを選択するとともにそれらの順番を設定することにより、少なくとも1つ以上の商談プロセスパターンを登録するための商談プロセス登録手段と、上記商談プロセス登録手段で登録した商談プロセスパターンの中から何れかを選択するとともに、その選択した商談プロセスパターン中に含まれる営業行為項目の実施予定日を設定することにより商談計画を作成する商談計画作成手段とを有することを特徴とする。

【0010】本発明のその他の特徴とするところは、上記商談計画作成手段は、選択した商談プロセスパターン中に含まれる営業行為項目に関連付けが定義されている

機能を自動実行する手段を具備することを特徴とする。

【0011】本発明のその他の特徴とするところは、上記種々の顧客をその階層別に登録する組織階層登録手段を更に具備し、上記顧客評価・分類手段による顧客の評価・分類、上記目標値設定手段による顧客別訪問回数目標値の設定、上記計画作成手段による訪問計画の作成、上記実績登録手段による訪問結果の登録、および上記進捗管理手段による進捗管理を、上記組織階層登録手段によって登録された組織階層ごとに行うようにしたことを特徴とする。

【0012】本発明のその他の特徴とするところは、上記目標値設定手段で設定された顧客別訪問回数目標値、上記計画作成手段により作成された訪問計画、上記実績登録手段により登録された訪問結果、および上記組織階層登録手段で登録された組織階層ごとの顧客名を1つの画面内に表示する表示手段と、上記顧客別訪問回数目標値を四角の数で表示するとともに、訪問予定日と訪問実施日とを上記四角の中に異なる色で区別して表示し、上記組織階層ごとの顧客名を上記顧客評価・分類手段による分類結果に対応して異なる色で区別して表示するように制御する表示制御手段とを具備することを特徴とする。

【0013】本発明のその他の特徴とするところは、上記表示制御手段は、上記訪問予定日および上記訪問実施日を入力するために使用するカレンダーを上記表示手段に表示させるとともに、上記カレンダー上で所望の日付が指定されたときに、その指定された日付が上記四角の中に画面上を移動していくように表示させることを特徴とする。

【0014】

【作用】本発明は上記技術手段より成るので、従来は専ら自己の立場を考慮した取引評価のみを行っていたのに対して、顧客の立場を考慮した客観評価も行われ、その評価結果に基づいて顧客が分類されることとなり、顧客の評価をより正確に行って取引拡大すべき顧客を明確にすることが可能となるとともに、上記取引拡大すべき顧客に対する訪問回数が多くなるように営業訪問力を的確に配分することが可能となる。

【0015】本発明の他の特徴によれば、訪問回数の目標値を設定したにもかかわらず、適切に訪問が実施されていない場合には警告が発せられるようになるので、その警告の有無を見ることによって現在最優先で訪問すべき顧客を容易に確認することができるようになる。

【0016】本発明のその他の特徴によれば、営業活動で行う一連の行為のうち、任意の複数の行為を組み合わせて種々の商談プロセスパターンがあらかじめ作成され、実際に個別商談を実施する際には、上記種々の商談プロセスパターンの中から適切なものを選択するだけで良いので、個別商談実施計画を簡単に作成することが可能となる。

【0017】本発明のその他の特徴によれば、種々の営業行為項目にはそれぞれ、例えばツール出力や実施結果点数入力などの機能をあらかじめ定義することが可能であり、機能が定義されている場合には、個別商談実施計画の作成の際に選択した商談プロセスパターンに含まれている営業行為項目に関連付けられている機能が自動実行されるので、営業マンが商談実施時に必要なツールを特に意識しなくてもそのツールが確実に得られるようになる。

【0018】本発明のその他の特徴によれば、顧客において購買意思決定に関わる全ての組織階層ごとに管理が行われることとなり、限られた営業訪問力をより的確に配分することが可能となる。

【0019】本発明のその他の特徴によれば、訪問回数を多くして取引拡大すべき顧客や、営業活動の進捗の様子などが一見して分かるようになり、営業生産性を向上させるために適切な訪問計画を簡単に作成することができるようになる。

【0020】本発明のその他の特徴によれば、日付が画面上をアニメーション効果によって移動していくので、ゲーム感覚で訪問計画を作成することができるようになり、また、訪問計画を作成する際の操作も分かりやすくなる。

【0021】

【実施例】出願人が長期にわたって調査を行った結果、限られた営業力の中で営業生産性を向上させるためには、以下の3つのことを継続的に実現する必要があることが明確になった。

- ①取引拡大したい顧客（取引拡大が可能な顧客）を明確にし、その顧客に営業力を集中させる。
- ②一方通行の売り込みではなく、取引拡大のビジネスチャンスに関わる情報を顧客から収集し、それを活用した提案により受注を図る。
- ③営業マンが営業活動に専念できるように余裕をつくる。

【0022】上記①～③の3つのコンセプトを実現するためには、次の3つのポイントを実施することが重要になってくる。

- ・取引拡大したい顧客に営業訪問力を適正に配分する。
- ・顧客の購買意思決定にかかわる人すべてに計画的な訪問活動を実施する。
- ・取引拡大のためのシナリオを持ち、これを計画的に実施する。

本実施例の営業生産性向上支援システムは、図16に示すように、以上の3つのポイントを実施することを支援する以下の4つの機能を有している。

【0023】(1) 営業訪問回数適正配分機能

本機能は、限られた営業訪問力を取引拡大したい顧客に適正に配分するための機能である。すなわち、本機能では、目標を設定するとともに、その設定した目標を実現

するために訪問計画を定期的に作成し、計画どおりに訪問を実施していくことを支援する。

【0024】(2) 組織階層別訪問対象管理機能

営業訪問を行うべき先は、1つの顧客について1つではない。すなわち、顧客の担当者だけでなく、その管理者など、相手の購買意思決定に関わる全ての人と定期的に接点を持つことは非常に有効である。本機能は、営業力を配分する顧客をその階層別に全て登録し、訪問回数等のアクションを各階層別に管理すること支援する。

【0025】(3) 商談実施支援機能

一般に、商談には、そこで行うべき行為とそのスケジュール、すなわち、あるべきプロセスが存在する。本機能は、パターン化されたあるべき商談のプロセスを参照しながら、個別商談の計画を簡単に作成し、その計画に基づいた活動を支援する。

【0026】(4) 計画的営業活動支援機能

本機能は、上記(1)～(3)の各機能を営業マンやマネージャーが常に意識しながら計画的に実施することを支援する機能である。すなわち、本機能は、上記(1)～(3)の各機能を組み合わせ、訪問計画の作成、その計画の実行結果の入力および分析などを分かりやすく、かつ、簡単にを行うことができるようにするための機能である。

【0027】以下、本発明の一実施例を図面に基づいて説明する。図1は、上記(1)～(4)の各機能を実現するための本実施例による営業生産性向上支援システムの要素的特徴を示す機能ブロック図である。また、図2は、図1に示した各機能ブロックを具体的に実施するためのハードウェア構成を示す図である。

【0028】図2に示したように、本実施例の営業生産性向上支援システムは、一般的に普及しているパソコンシステムによって実現される。すなわち、同図において、21はCPU、ROM、RAMなどを内蔵したパソコン本体、22はキーボード、23はマウス、24はディスプレイ装置である。

【0029】25はツールデータベース記憶部であり、営業活動に使用する種々のツールが記憶される。上記種々のツールとしては、例えば、顧客に対する興味付けツール、反応伺いツール、顧客別興味付け進捗管理シート、ビジネスチャンス情報収集ツール、キーマン評価ツールなどを挙げることができる。

【0030】26は顧客別進捗管理データ記憶部であり、営業マンによって入力される訪問計画や訪問結果、あるいはマネージャーによって入力される営業活動の企画内容などに基づく進捗データが記憶される。27は取引実績データ記憶部であり、顧客との取引実績に関するデータが記憶される。

【0031】なお、これらのツールデータベース記憶部25、顧客別進捗管理データ記憶部26および取引実績データ記憶部27は、例えばハードディスクやフロッピーディスクなどで構成される。

【0032】28は必要ツール作成部であり、上記ツールデータベース記憶部25に記憶された各種ツールの中から選択されたツールを実際に作成するものであり、例えば顧客あての書類を印刷するための印刷装置などで構成される。

【0033】営業マンは、このような構成のパソコンシステムを用いて営業計画を作成し、その計画を実行し、実行結果を評価することにより営業活動を実施する。これにより、営業マンの経験や勘に頼っていた従来に対して、本実施例では営業活動の標準化を図ることができ、営業生産性を向上させることができるようになる。

【0034】次に、図1において、1はデータ入力部であり、図2に示したキーボード22およびマウス23により構成される。2は顧客評価・分類部であり、一定の評価基準の下に種々の顧客を評価・分類する。以下、この顧客評価の方法を、次に示す図3に基づいて説明する。

【0035】図3から明らかなように、本実施例では、客観評価と取引評価との2つの側面から顧客を評価している。客観評価の評価項目としては、例えば、売上、経営者のやる気、将来性、立地条件などがあり、これらの項目は相手企業（顧客）の立場を考慮したものとして把握される。また、取引評価の評価項目としては、例えば、取引高、粗利率、占有率、回収条件などがあり、これらの項目は自企業の立場を考慮したものとして把握される。

【0036】また、本実施例の顧客評価・分類部2は、上述のようにして行った評価に基づいて顧客を4つの分類に分けている。すなわち、図3に示したように、客観評価の結果を縦軸にとり、取引評価の結果を横軸にとり、それぞれの評価の高低に応じて顧客を改善管理客、重点管理客、準重点管理客および成行管理客の4つの分類に分けている。

【0037】ここで、改善管理客とは、取引評価の結果は低いが、客観評価の結果が高い顧客で、営業活動に何らかの改善を加えれば取引が更に拡大する可能性のある顧客のことを言う。また、重点管理客とは、客観評価の結果と取引評価の結果とが何れも高い顧客であり、いい得意先でしかも発展性がある顧客のことを言う。

【0038】また、準重点管理客とは、取引評価の結果は高いが、客観評価の結果が低い顧客で、いい得意先だが発展性に欠ける顧客のことを言う。さらに、成行管理客とは、客観評価の結果と取引評価の結果とが何れも低い顧客で、発展性がない顧客のことを言う。

【0039】図4は、以上のような顧客評価および分類の手順を示す図である。すなわち、マネージャーなどのオペレータが、あらかじめ作成された図4(a)のような評価テーブルを参照して、図1のデータ入力部1を用いて客観評価および取引評価の各項目ごとに5点満点の評価点を入力する。これにより、図4(b)のような顧

客評価結果を得る。

【0040】なお、この評価に際して、顧客が小売店であるか量販店であるかによって異なる評価テーブルが用いられる。また、評価テーブル自体を営業生産性向上支援システムが具備し、マネージャーが各項目に実際に数値を入力すると、それが評価点に自動的に置き換えられるように構成しても良い。

【0041】各項目の評価点を入力すると、顧客評価・分類部2により、各顧客ごとに客観評価の評価点の合計と取引評価の評価点の合計とがそれぞれ別個に計算され、その結果が図4(c)に示す座標系にプロットされることにより、各顧客が4つの分類に分けられる。図4(c)に示した分類結果は、図1の表示部8に表示され、印刷部9により印刷することもできる。この表示部8は図2のディスプレイ装置24に対応し、印刷部9は必要ツール作成部28に対応するものである。

【0042】なお、図4(c)中の点線で示した各分類の境界は、全ての項目を3点とした場合に得られるものであるが、これは任意に変更可能である。また、各項目の評価点を単純に加算するのではなく、重み付けをしながら加算するようにすることも可能である。

【0043】ところで、従来より、簡単な販売管理ツールが提案されていたが、この販売管理ツールは専ら取引評価のみを行うものであった。これに対して本実施例では、客観評価も行い、顧客の立場も考慮して評価・分類を行っている。このようにすることにより、顧客の評価をより正確に行うことができ、取引を拡大すべき顧客、維持すべき顧客、あるいは成り行きまかせにすべき顧客などの判断を容易に行うことができるようになる。

【0044】再び図1に戻って説明する。3は目標値設定部であり、顧客別の月間訪問回数の目標値を設定するものである。すなわち、営業マンまたはマネージャーは、上記顧客評価・分類部2による評価・分類の結果と、取引実績データ記憶記憶部27に記憶されている過去の取引実績とを参照して具体的な取引予算数値を定め、これを実現するための最適な顧客別月間訪問回数の目標値をデータ入力部1を用いて入力する。

【0045】なお、本実施例では、設定した訪問回数の目標値を確実にこなすことができるようにするために、営業マンが月間に訪問可能な延べ件数を算出しておき、それを上まらない範囲でのみ訪問回数を設定できるようにしている。すなわち、上述のようにして顧客別の月間訪問回数目標値を入力すると、図5に示す画面の訪問回数チェック欄51に月間訪問回数の合計が表示され、同時に1日当たりの訪問平均件数が表示される。そこで、月間訪問回数の合計が営業マンが訪問可能な延べ件数を上まわらないように目標値を調整する。

【0046】このように本実施例では、これまでの販売管理ツールと異なり、過去の取引実績と顧客評価結果に基づきその顧客をどうしたいのかの意思とを反映した取

引予算数値、およびそれを実現するために行うべき訪問回数とを設定するようにしているところに特徴がある。

【0047】そこで、上述のような評価・分類によって明確にした取引拡大したい顧客に対して訪問回数が多くなるように目標値を設定することにより、営業訪問力を取引拡大したい顧客に適正に配分することができるようになる。なお、営業生産性を効率よく向上させるには、改善管理客、重点管理客、準重点管理客、成行管理客の順番で営業力を配分するのが好ましい。

【0048】上記目標値設定部3により設定された顧客別月間訪問回数の目標値は、進捗管理部6を介して顧客別進捗管理データ記憶部26に与えられ、記憶される。また、顧客別進捗管理データ記憶部26に記憶された上記顧客別月間訪問回数の目標値は、進捗管理部6を介して表示制御部7に与えられ、この表示制御部7による制御の下で表示部8に表示される。

【0049】図6は、上記表示部8に表示される画面の一例を示す図であり、営業マン用の月間訪問予定／実績入力画面を示す図である。上述のように設定された訪問回数の目標値は、図6中の予定／実績表示エリア61に反映されて表示される。すなわち、上記予定／実績表示エリア61において、太線で囲んだ領域61aが訪問回数の目標値を表しており（以下、この領域を訪問回数表示領域という）、同領域61a内にある□の数が訪問回数の目標値に対応している。

【0050】再び図1において、4は顧客階層登録部であり、営業力を配分する顧客をその階層別に登録するのである。上述したように、営業訪問を行うべき先は、1つの顧客について1人の担当者だけでなく、その上司や関係部署の人など、顧客において購買意思決定に関わる人全てである。

【0051】そこで、本実施例では、顧客階層登録部4を設け、図7に例示するように、購買意思決定に関わる人とその上下関係とを登録することができるようにしている。なお、登録に必要な手続きは、営業マンまたはマネージャーがデータ入力部1を用いて行う。

【0052】上記した図7の例のように顧客階層を登録すると、図8に示すように、月間訪問予定／実績入力画面の顧客名エリア81には、階層別に登録した顧客名が、上記顧客評価・分類部2による顧客評価結果に基づき活動ウェイトをかける順に並んで表示されるようになる。このとき、これらの顧客名は、図8からは明確でないが、上記顧客評価・分類部2による分類結果（重点管理客、改善管理客、準重点管理客、成行管理客の何れであるか）に応じて異なる色で表示される。

【0053】また、顧客階層を登録すると、先に述べた目標値の設定や、後に述べる訪問計画の作成やその実績集計なども顧客階層別に行うことができるようになる。

【0054】次いで、5は計画作成部であり、営業マンの訪問計画（商談プロセスを含む）を作成するものであ

る。営業マンまたはマネージャーは、上記目標値設定部3により設定された目標値に基づき表示部8に表示される上記月間訪問予定／実績入力画面などを参照して、データ入力部1を用いて種々のデータを入力すると、上記計画作成部5は、この入力されたデータを用いて訪問計画を作成する。

【0055】訪問計画を作成する際には、図6に示した訪問回数表示領域61a内の個々の□に訪問予定日を埋めていくという作業を行う（予定入力の実績入力を行った後に行うものであるため、図6には実績入力モードの画面が示されており、予定入力モードの画面は図8に示している）。操作としては、まず、予定／実績入力ボタン63を操作して予定入力モードを選択する。なお、予定入力モードを選択した場合は日付選択エリア62内の日付は青色で表示され、実績入力モードを選択した場合は赤色で表示される。

【0056】次に、日付選択エリア62において、訪問を予定している日付上にマウスカーソルを置き、マウスボタンをクリックすれば、その日付が予定／実績表示エリア61にアニメーション効果によって自動的に移動していき、訪問回数表示領域61a内にある個々の□に先頭から順番に埋められていく。こうして訪問予定の日付を入力すると、各日付ごとの訪問件数の合計が訪問件数エリア64に表示される。これにより、営業マンが訪問可能な1日当たりの平均訪問件数と比較して、実現可能かどうかを確認することができる。

【0057】なお、図面の都合上、訪問回数表示領域61a内において、青色表示の日付を通常の数字で表し、赤色表示の日付を○付きの数字で表している。赤色表示の数字は、後述する手順によって入力された訪問実施日を示すものである。このように、本実施例では、訪問予定の日付と訪問実施日の日付とを色を異ならせて表示するようにしているので、両者を一目で区別することができる。

【0058】また、上記訪問回数表示領域61a内において、斜線で示した部分は、実際には例えば黄色で表示されている領域である。この領域は、例えば、□の数で示された月間訪問回数目標値に対して実際に訪問した日にちが少なく、進捗の度合いが低い場合に警告を与えるために表示されるものであり、現時点で最優先に訪問すべき顧客とその回数とを示している。したがって、この黄色表示の領域は、月末に向かうほど多くなっていく。

【0059】このように、本実施例では、訪問計画を作成する際に、訪問回数表示領域61a内にある□の数を見ることによって月間訪問回数目標値を容易に確認することができ、□の数が多い顧客に対して訪問予定日付をより多く配分するという意識を働かせることができる。また、黄色表示の警告がされている顧客に対しては、訪問予定日付を最優先で設定するという意識を働かせることもできる。このため、訪問回数目標値の達成を常に考

慮した訪問計画の作成と実績のチェックとを行うことができるようになる。

【0060】上述したように、計画作成部5は、商談プロセスの作成も行う。営業活動には様々な行為があるが、これらの行為は連続しており、それらの行為を目的別に並べたものが商談プロセスになる。つまり、商談を実施するということは、種々の行為を記載したカードの束を順番にめくり、そのカードの記載内容を実施していくことに置き換えられる。本実施例の計画作成部5は、カードの作成とその順番の決定とをパソコン上で簡単に行うことができるようにしている。

【0061】すなわち、計画作成部5の商談プロセスを作成するための構成は、図9のようになっている。以下、この図9の構成を参照しながら、商談プロセスを作成する手順を説明する。

【0062】まず、図9の営業行為項目登録部91において、営業活動で行う一連の行為ごとに、実施にあたって必要なツール（例えば、顧客に提供すべき情報や顧客から収集すべき情報）を定義することにより、複数の行為カード（営業行為項目）を作成する。ここでは、図10に示すように、営業行為名や商談にあたって必要なツール名をキーボード入力するとともに、営業行為分類名や商談進捗分類名をあらかじめ設定されているドロップダウンリスト（図示せず）から選択する。

【0063】次に、商談プロセス登録部92において、上記営業行為項目登録部91で作成した複数の行為カードの中から幾つかを任意に選択し、それらの選択した行為カードの順番および実施期間を設定することにより商談プロセスパターン（商談分類）を登録する。また、その登録に際して、スケジュールを作成する際に基準となる行為を定義しておく。

【0064】具体的には、図11に示すように、商談分類エリア111に商談分類名をキーボード入力するとともに、営業行為項目エリア112の中から商談プロセスを構成する行為カードを任意に選択し、その選択した行為カードを営業行為計画エリア113に順に張り付けていく。そして、営業行為の各週のセル114に、選択した行為を何回行うかを数値で入力することにより、営業行為ごとに実施期間の設定を行う。

【0065】営業マンが個別商談を実施するにあたっては、商談計画作成部93において、上記商談プロセス登録部92で登録した商談プロセスパターン（商談分類）の中から適切なものを選択するとともに、基準行為の日付を設定することにより、個別商談実施計画を作成する。

【0066】すなわち、図12に示すように、商談エリア121に商談名をキーボード入力するとともに、商談分類エリア122において上記商談プロセス登録部92で登録した商談プロセスパターン（商談分類）をドロップダウンリストから選択する。すると、営業行為計画エ

リア113に営業行為とその実施回数および実施期間が自動的に表示される。

【0067】次に、対象顧客エリア123においてドロップダウンリストから対象顧客を選択するとともに、基準営業行為項目エリア124において既に登録されている営業行為項目（行為カード）をドロップダウンリストから選択する。そして、基準日エリア125に基準日を入力して設定ボタン126を押すと、営業行為計画エリア113が上記入力した基準日と上記選択した営業行為にあわせて自動的に設定される。

【0068】以上のように、本実施例では、営業活動で行う一連の行為のうち、任意の複数の行為を組み合わせる種々の商談プロセスパターンをあらかじめ作成しておき、実際に個別商談を実施する際には、上記種々の商談プロセスパターンの中から適切なものを選択するだけで良いので、個別商談実施計画を簡単に作成することができる。

【0069】なお、計画作成部5において上述した訪問計画を作成する際には、作成した商談計画を一覧で参照することができるようになっている。図13は、その参照画面の一例を示している。図13において、商談進捗表131の上部には、図12の画面に基づいて設定された商談計画が表示される。

【0070】この商談進捗表131の計画実績欄の始めの4週間に関しては、すぐ下の各週行為カード欄132に各週ごとに行うべき行為カードが示されている。この各週行為カード欄132に示されている行為カードは、計画はしたが、まだ実施していない行為を示すカードである。したがって、この表示を見れば、今やるべき行為を的確に判断することができる。

【0071】そこで、営業マンは、各週行為カード欄132において、最も現在に近い週の残されている行為カードをマウスクリック操作によって選択するとともに、右の予定入力欄133の日付を選択することにより、これからやるべき行為を設定する。すると、選択した行為カードが上記日付の下に表示される。

【0072】また、このように商談計画を登録すると、図8に示した予定入力モード時の月間訪問予定／実績入力画面では、その商談計画を予定した日付が青色で表示される。さらに、この月間訪問予定／実績入力画面では、現在登録されている商談の件数が商談件数エリア82に表示される。

【0073】これにより、この商談件数と、月間訪問回数目標値を表す白抜きの□の数と、色分け表示された顧客名、訪問予定／実績の日付および訪問件数の合計とを見ることによって、「バランス良い訪問活動を行うためにどこに訪問すべきか」と「今抱えている商談をこなすためにどこに訪問すべきか」という2つの観点から判断することができ、その結果、全体のバランスを見ながら訪問すべき顧客を的確に判断することができる。

【0074】なお、予定した行為カードの実施にあたって必要なツールが上記営業行為項目登録部91であらかじめ登録されている場合は、それが印刷部9により自動印刷される。その際、そのツールに顧客名などを入れることができるため、オンリーユーなツールを作成することができる。

【0075】一方、営業マンは、計画した営業活動を実際に行った場合は、実績登録部10を用いてその訪問結果を実績として登録する。この訪問結果の入力時にも登録されている商談の一覧を参照することができる。すなわち、図6に示した月間訪問予定／実績入力画面において、実績入力モードを選択して日付選択エリア62内の日付をマウスクリックすると、図14に示すような図13と同様の訪問予定／実績入力画面が表示される。

【0076】図14において、商談進捗表131の上部には、図13の画面と同様に商談計画が表示される。また、右の実績入力欄141に示されている行為カードの中から実際に行った行為カードを選択し、その下の空白部をクリックすると、カードの文字が青色から赤色に変化し、実績として登録される。こうして登録された実績は、商談進捗表131の計画実績欄の下部に自動的に反映して表示される。そして、この図14に示した画面を閉じると、図6に示した画面に戻る。このとき、青色の予定表示が赤色の実績表示に自動的に変わっている。

【0077】また、本実施例の営業生産性向上支援システムでは、商談進捗の様子を一覧表示したり印刷したりすることができ、管理に役立てることができる。図15は、商談進捗の一覧表示画面を示す図である。この画面では、図14に示した画面の商談進捗表131の計画実績欄の表示が、商談進捗の度合いの高いものから順に表示される。

【0078】以上に述べたような本実施例の商談実施支援機能によって、複数の商談の計画的実施を支援することができるだけでなく、図示しない携帯端末装置にフロッピーディスク等を介してデータを渡すことができるため、商談実施にあたって必要なツールをその場で作成したり、実施後の結果を集計したりすることができる。このため、営業現場に必要なチェックおよびアクションを簡単に行えるというメリットがある。

【0079】なお、以上に説明した図1の顧客評価・分類部2、目標値設定部3、顧客階層登録部4、計画作成部5、進捗管理部6および表示制御部7は、図2に示したパソコン本体1に内蔵されている図示しないCPU、ROM、RAMなどによって構成されている。

【0080】

【発明の効果】本発明は上述したように、自己の立場を考慮した取引評価だけでなく、顧客の立場を考慮した客観評価をも行い、その評価結果に基づいて顧客を分類するようにしたので、顧客の評価をより正確に行って取引拡大すべき顧客を明確にすることができ、営業活動にお

ける無駄を省いて営業訪問力を種々の顧客に適正に配分することができるようになる。

【0081】本発明の他の特徴によれば、目標値設定手段により設定された顧客別訪問回数目標値と、計画作成手段により作成された訪問計画と、実績登録手段により登録された訪問結果とを用いて営業活動の進捗を管理し、上記顧客別訪問回数目標値に対する進捗の度合いが低い場合に警告を発するようにしたので、警告の有無を見ることによって現在最優先で訪問すべき顧客を容易に確認することができ、設定した訪問回数目標値を確実に達成できるように支援することができる。

【0082】本発明のその他の特徴によれば、営業活動で行う一連の行為のうち、任意の複数の行為を組み合わせて種々の商談プロセスパターンをあらかじめ作成しておき、実際に個別商談を実施する際には、上記種々の商談プロセスパターンの中から適切なものを選択することにより商談計画を作成するようにしたので、商談計画を簡単に作成することができ、客先への訪問前に準備しなければならない作業を少なくして営業マンが商談に専念できるようにすることができる。

【0083】本発明のその他の特徴によれば、個別商談実施計画の作成の際に選択された営業行為項目に関連付けが定義されている機能を自動実行するようにしたので、例えば、上記機能としてツールの出力機能が定義されている場合には、営業マンが商談実施時に必要なツールを特に意識しなくてもそのツールを確実に得ることができるようになり、客先への訪問前に準備しなければならない作業を更に少なくすることができる。

【0084】本発明のその他の特徴によれば、種々の顧客をその階層別に登録する組織階層登録手段を設け、組織階層ごとに進捗管理を行うようにしたので、顧客において購買意思決定に関わる全ての人に対して詳細な管理を行うことができるようになり、限られた営業訪問力を更に的確に配分することができるようになる。

【0085】本発明のその他の特徴によれば、顧客別訪問回数目標値を四角の数で表示するとともに、訪問予定日と訪問実施日とを上記四角の中に異なる色で区別して表示し、組織階層ごとの顧客名を顧客評価・分類手段による分類結果に応じて異なる色で区別して表示するようにしたので、営業訪問力を集中すべき顧客や、営業活動の進捗の様子を一見して理解することができるようになり、訪問計画の作成や実績入力などの作業を分かりやすく簡単に行うことができ、営業活動で最も重要な商談以外の作業を必要最小限に抑えることができるようになる。

【0086】本発明のその他の特徴によれば、上記訪問予定日および上記訪問実施日を入力するために使用するカレンダーを上記表示手段に表示させるとともに、上記カレンダー上で所望の日付が指定されたときに、その指定された日付が上記四角の中に画面上を移動していくように

表示させるようにしたので、ゲーム感覚で訪問計画を作成することができるとともに、その作成のための操作を分かりやすくすることができる。

【0087】以上のことにより、本発明によれば、営業活動の最適な標準化を図り、営業生産性を革新的に向上させることができる。

【図面の簡単な説明】

【図1】本発明の営業生産性向上支援システムの要素的特徴を示す機能ブロック図である。

【図2】図1に示した各機能ブロックを具体的に実施するためのハードウェア構成を示す図である。

【図3】顧客評価・分類部による顧客の評価・分類法を説明するための図である。

【図4】顧客評価・分類部による顧客の評価・分類の手順を示す図である。

【図5】顧客別月間訪問回数目標値の設定画面を示す図である。

【図6】月間訪問予定／実績入力画面（実績入力モード）を示す図である。

【図7】顧客階層の登録画面を示す図である。

【図8】月間訪問予定／実績入力画面（予定入力モード）を示す図である。

【図9】計画作成部の構成を示すブロック図である。

【図10】営業行為項目（行為カード）の登録画面を示す図である。

【図11】商談プロセスパターン（商談分類）の登録画面を示す図である。

【図12】個別商談実施計画の作成画面を示す図である。

【図13】訪問予定／実績入力画面（予定入力モード）を示す図である。

【図14】訪問予定／実績入力画面（実績入力モード）を示す図である。

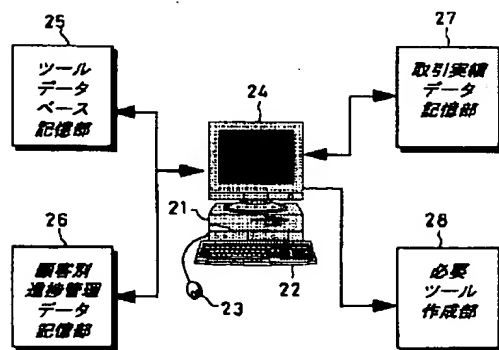
【図15】商談進捗一覧表示画面を示す図である。

【図16】本実施例の営業生産性向上支援システムによって実現される機能のその関係を示す図である。

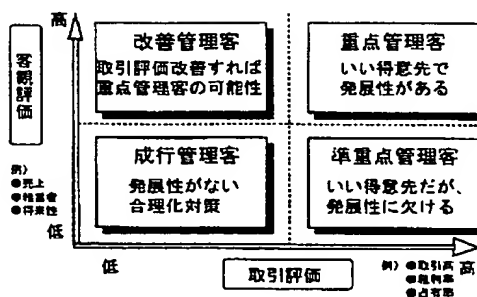
【符号の説明】

- 1 データ入力部
- 2 顧客評価・分類部
- 3 目標値設定部
- 4 顧客階層登録部
- 5 計画作成部
- 6 進捗管理部
- 7 表示制御部
- 8 表示部
- 9 印刷部
- 10 実績登録部
- 21 パソコン本体
- 22 キーボード
- 23 マウス
- 24 ディスプレイ装置
- 25 ツールデータベース記憶部
- 26 顧客別進捗管理データ記憶部
- 27 取引実績データ記憶部
- 28 必要ツール作成部
- 91 営業行為項目登録部（カード作成）
- 92 商談プロセス登録部
- 93 商談計画作成部

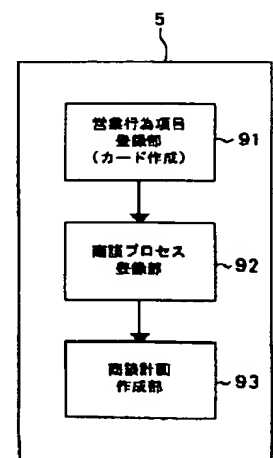
【図2】



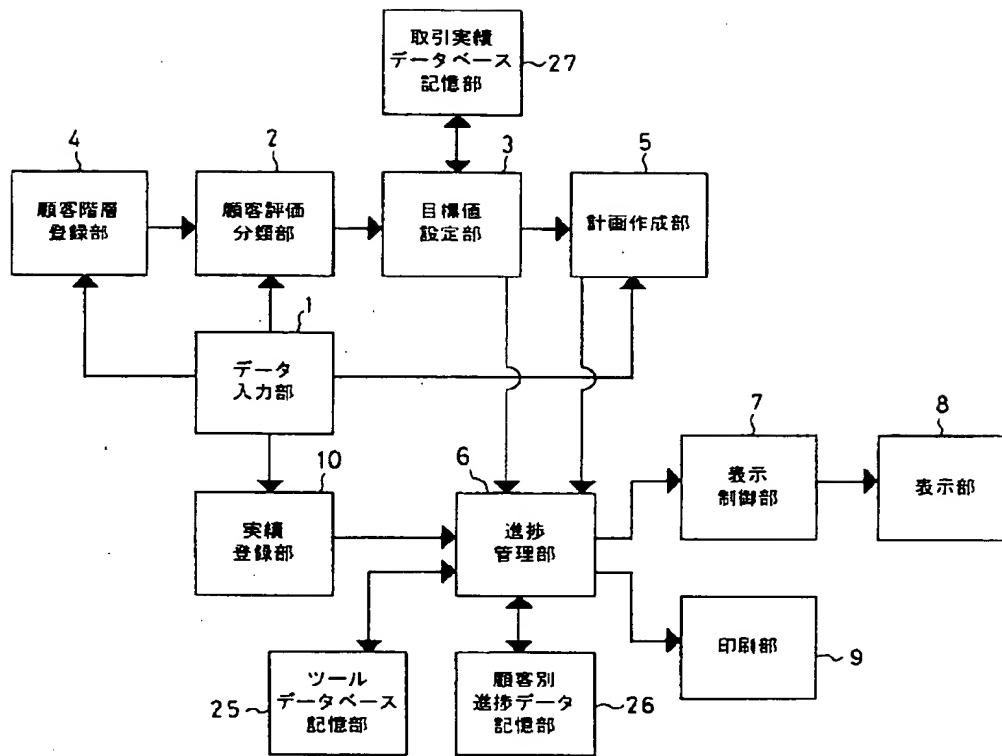
【図3】



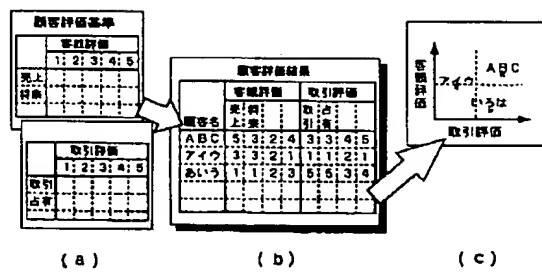
【図9】



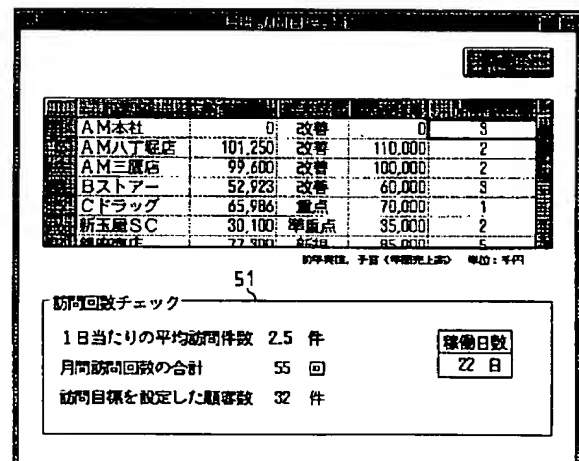
【図1】



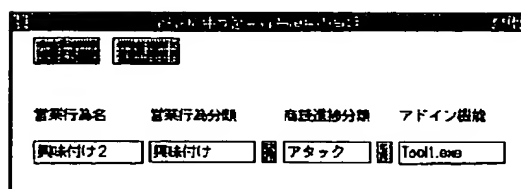
【図4】



【図5】



【図10】



月間計画/本部入力

予定印刷
閉じる

1995年4月5日(水)

◀ 4月度 ▶
営業部1課 日本 太郎

61

拡大客
維持客
情報室

63

顧客分類
顧客名

予定/実績表示

実績入力

	顧客分類	顧客名	予定/実績表示										実績入力						
			1	2	3	4	5	6	7	8	9	10	日	月	火	水	木	金	土
一般小売店	よしだや	24										2	3	4	5				
一般小売店	滝沢商事	5										2	3	4	5				
一般小売店	若田屋											2	3	4	5				

61a

62

● : 重点
◎ : 改善
◎ : 準重点
◎ : 成行
◎ : 新規

64

拡大客

維持客

情報室

	訪問件数	0	2	1	0		
訪問件数	1	0	0	0			
訪問件数	0	0	0	0			
合計	1	2	1	0			

[illegible][illegible]

【图8】

月間店別予定／客種入力

81 登録部1課 日本 太郎 82

1995年4月5日(水) 61

顧客分類	顧客名	高反 件数	予定／実績表示										予定入力							
			1	2	3	4	5	6	7	8	9	10	日	月	火	水	木	金	土	
豊飯店	AM本社	1															5	6	7	8
豊飯店	AM八丁	2															5	6	7	8
豊飯店	AM三浦店	1															5	6	7	8
豊飯店	Bストアー	3															5	6	7	8
豊飯店	Cドラッグ	1															5	6	7	8
豊飯店	新玉屋SC	1															5	6	7	8
豊飯店	豊盛商店	1															5	6	7	8

● : 重点 ● : 改善 ● : 準重点 ● : 成行 ● : 新規

拡大客 訪問件数
 継続客 訪問件数
 情報源 訪問件数
 合計

			1	2	0	0
			0	0	0	0
			0	0	0	0
			1	2	0	0

64

【图 1 1】

商販分販の登録

新規 戻る 登録 削除 閉じる

新製品名

営業行為項目

112

111

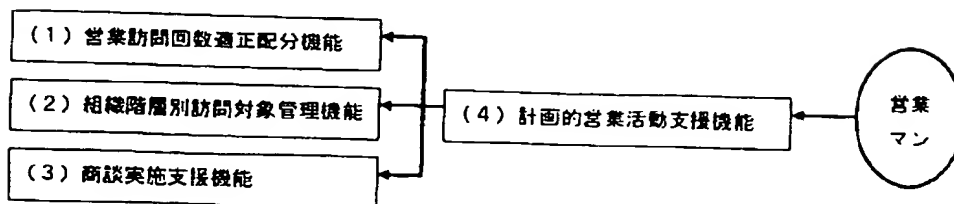
>> 選択

取消 <<

		1月	2月	3月	4月	5月
	営業行為	1	2	3	4	5
1	調味付け1	1				
2	調味付け2	1	1			
3	調味付け3	2	1	1		
4	ヒアリング	2	2			
5						
6						

114

【図 16】



【図12】

画面登録

121 画面名: 災害用品セール

122 画面分類: 新商品画面

123 対象顧客: Bストア

125 基準日: 03年04月02日

126 設定

基準営業行為項目: 既付付3

124 高換開始日: 05年04月02日

113

営業行為	実施回数	4月日																				
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	
1 既付付1	1	1																				
2 既付付2	1	1																				
3 既付付3	2		1	1																		
4 ヒアリング	2		2																			
5 プモ	1		1																			
6 顧客	1			1																		
見取り	1			1																		

【図13】

画面設定/登録入力

顧客名: Bストア

新規画面 閉じる

今日は、04月10日です

予定入力

131

132

133

03/26~ 04/02~ 04/09~ 04/16~

09 10 11 12 13 14 15

(A)既付1 集金

補充カード

(A)既付1 (A)既付2 (A)既付3 (V)ヒアリング

訪問回数

0	1	2	3	4	5
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0
0	0	0	0	0	0

顧客外カード

集金 集計し 販売店様 納品 その他

【図 14】

顧客名: Bストア

P日商品販売 春の小物商展 災害用品セール

商展連日表 131 A: 基連日 商展終了

商展連日表

商展日程 03/01-04/25

補完カード

04/02~ 04/09~ 04/16~ 04/23~

(A) 補完1 (B) ヒアング (C) フネ

(A) 補完2 (B) ヒアング (C) フネ

(A) 補完2 (B) ヒアング (C) フネ

(A) 補完3 (B) ヒアング (C) フネ

補完カード

(A) 補完1 (B) ヒアング (C) フネ

(A) 補完2 (B) ヒアング (C) フネ

(A) 補完3 (B) ヒアング (C) フネ

(A) ヒアング (B) フネ (C) ヒアング

商展外カード

現金 印刷 販売店 商品 その他

訪問回数 02030405060708

拡大客 維持客 情報返 合計